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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

EMPLOYER SERVICES COMMITTEE

DOCUMENTS DEPT.

MAY 25 2001

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Date:	Friday, June 1, 2001
Time:	9:30 a.m. – 11:00 a.m.
Location:	Auditorium Community College District Office 33 Gough Street San Francisco CA 94103

AGENDA APPEARS ON THE REVERSE SIDE

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To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Issued: Tuesday, May 22, 2001

PROPOSED AGENDA

- 9:30 a.m. 1. Adoption of the Agenda - Nathan Nayman (*Action Item*)
- 9:35 a.m. 2. Public Testimony on Agenda Items (Discussion Item)
- 9:40 a.m. 3. Welcome and Introduction – Nathan Nayman (Discussion Item)
- 9:50 a.m. 4. Overview of Employer Services at the PIC, Inc. (Discussion Item)
 - A. Employer Tax Credits - Lucia Chan
 - B. Labor Market Information – Greg Marutani
- 10:10 a.m. 5. Scope of the Employer Services Committee (Discussion Item)
 - A. Members' Perspective - All
 - B. Relationship with Other WISF Committees - All
- 10:40 a.m. 6. Public Testimony on Non-Agenda Items (Discussion Item)
- 10:50 a.m. 7. Future Agenda Items (Discussion Item)
- 11:00 a.m. 8. Adjournment (*Action Item*)

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

EMPLOYER SERVICES COMMITTEE

Date:	Friday, September 28, 2001
Time:	9:00 a.m. – 11:00 a.m.
Location:	Auditorium Community College District Office 33 Gough Street San Francisco CA 94103

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SEP 13 2001

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Revised: Thursday, September 13, 2001

PROPOSED AGENDA

Public testimony will be taken throughout the meeting

1. Adoption of the Agenda (*Action Item*)
2. Approval of the Minutes for June 1, 2001 Meeting (*Action Item*)* (material enclosed)
3. Discussion of the Five-Year Strategic Plan (Discussion/ Action Item) (material enclosed)
4. Strategic Planning (Discussion Item)
5. Recommendation for Employers and Training Providers Forum (Action Item) (material enclosed)
6. Public Testimony on Non-Agenda Items (Discussion Item)
7. Future Agenda Items (Discussion Item)



PRIVATE INDUSTRY COUNCIL
of San Francisco, Inc.

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employment
opportunities*

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE

DATE: SEPTEMBER 13, 2001

FROM:  NATHAN NAYMAN, CHAIRPERSON

SUBJECT: IDENTIFICATION OF EMPLOYER SERVICES ACTIVITIES FROM THE SAN FRANCISCO STRATEGIC FIVE-YEAR LOCAL WORKFORCE INVESTMENT PLAN (Agenda Item #3)

In implementing the Workforce Investment Act (WIA), the Strategic Transition Committee of the Private Industry Council (PIC) prepared the required Strategic Five-Year Local Workforce Investment Plan and submitted it to the Governor for his approval, which was eventually received.

The Workforce Investment Division of the State has provided an opportunity to revise and amend the current Plan if a local Workforce Investment Board so desires. Through the Executive Committee of the Workforce Investment San Francisco, the Employer Services Committee is being asked to review the current Five-Year Strategic Plan and to submit its recommendations to amend the Plan that pertains to employers services activities.

Attached is a copy of the Plan. PIC staff has bolded and italicized portions of the Plan that staff believes pertain to the Employer Services Committee. This document should act as basis for our strategic planning discussion for our committee. It can serve as a guide for our work plans.

I would like to get your comments back by e-mail or by fax prior to our upcoming meeting on September 21st. Please submit your comments by e-mail or by fax to Lucia Chan. Her e-mail is lchan@sftaxcredits.com and her fax number is (415) 431-8702.

Staff will be available at your meeting on September 28th to participate in discussions and be informed by your comments. If you have any questions in advance of the meeting, please call either Lucia Chan or Greg Marutani at 431-8700.

cc: WISF Board Members
PIC Staff



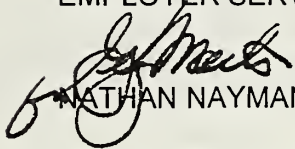
PRIVATE INDUSTRY COUNCIL
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MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE

DATE: SEPTEMBER 13, 2001

FROM:  NATHAN NAYMAN, CHAIRPERSON

SUBJECT: EMPLOYERS AND TRAINING PROVIDERS FORUM (Agenda Item #5)

The Employer Services Committee is being asked to review and consider staff proposed plan to convene a forum of employers and training providers.

Background:

At our meeting on June 1, 2001, we discussed hosting an Employers Forum to find out how best to meet local workforce development needs. We discussed the targeted audience should be small business owners as well as HR representatives that represent large business owners.

Page 12 paragraph 5 of the San Francisco Strategic Five-Year Local Workforce Investment Plan reads:

"The WIB will convene a forum of employers and training providers to discuss how best to meet local workforce development needs. Participating employers will provide detailed information on current job opportunities and specific skill requirements (soft and hard skills) to promote the development of essential employment competencies. In addition, the employers on the PIC/WIB and the EDD's Employer Advisory Committee will be primary sources of employer input using "Sector analysis" and/or "Gap analysis" techniques."

Recommendation:

Convene a Employers and Training Providers Forum

Target Audience:

Small to large size employers and training providers

Purpose of the forum:

To discuss how best to meet local workforce development needs and to provide information on current job opportunities and specific skill requirements and to promote the development of essential employment competencies. It also serves the purpose of increasing employers' awareness of services that the city provides.

When:

Tentatively end of October or early November

Location:

To Be Determined

Projected number of attendees:

Approximately 150 - 200

Sponsors/Resources:

Based on our preliminary discussion with the Director of the Mayor's Office of Small Business Affairs, the Small Business Commission is willing to be sponsor of this event. Staff also identified potential sponsors/resources such as the Committee on Jobs, the San Francisco Partnership, the San Francisco Chamber of Commerce, Employment Development Department, Community of Contracting Agencies, Workforce Investment Board, human resource groups and the Private Industry Council of San Francisco, Inc.

Format: (we will seek input from HR groups)

1. Presentation on One-Stop San Francisco employer services (full group session)
2. Break out work group sessions

Possible topics for discussion

- Language gap between employers and training Providers
- Customized training
- Sector specific curriculum design
- Career ladder training
- Hiring tax incentives
- Skills gap – what employers think job seekers are lacking
- Rapid response

3. Luncheon
4. Full group session to discuss recommendations and conclusion

Staff will be available at your September 28th meeting to answer any questions you may have.

cc: WISF Board Members
PIC Staff

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**DRAFT OF MINUTES FOR THE
SEPTEMBER 28, 2001 MEETING OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

COMMITTEE MEMBERS PRESENT:

Irene Agnos, Scott Hauge (9:15 AM), Kes Narbutas, Nathan Nayman, Ave Seltsman, and Stan Warren.

COMMITTEE MEMBERS ABSENT:

William Allen, Kathye Citron, Carol Piasente, and John Poremba.

OTHER WIB MEMBERS PRESENT:

Lynn Bunim, Chair of the WIB.

STAFF PRESENT

Brenda Brown, Pamela Calloway, Lucia Chan, Alice Chiu, Wes Dixon, Karen Hart, and Greg Marutani

GUESTS:

Terri Feeley, Barbara Arms, Patricia Peretz, Joanna Diaz, Abby Lanzinger, Henry Lau, Nichelle, Scott, Aquila Yeargin, Betty Web, Cody Melcho, and Lisa Gray.

The meeting began at 9:07 a.m. A quorum was not established.

Nathan Nayman, Chair of the Committee apologized for having to leave to attend an unexpected meeting. He introduced Committee member Irene Agnos who agreed to chair the meeting, and Pamela Calloway, President of the Private Industry Council of San Francisco, to assist Ms. Agnos. Irene Agnos started the meeting by saying the last time this committee met was June 1st. She emphasized that a lot has happened since June for us personally, our country and the effects on our economy in how we do business. She noted that the Committee has a lot of work ahead to respond to the downturn of the economy and the challenges that employers encounter as a result of it.

Scott Hauge arrived at 9:15 AM, establishing a quorum.

Motion to adopt the agenda

Moved by Kes Narbutas and seconded by Ave Selstman.

Ayes: Scott Hauge, Kes Narbutas, Ave Seltsman, and Stan Warren.

Nays: None.

Abstentions: None.

Motion passed.

Motion to adopt the minutes of the June 1, 2001 meeting.

Moved by Kes Narbutas and seconded by Ave Selstman.

Ayes: Scott Hauge, Kes Narbutas, Ave Seltsman, and Stan Warren.

Nays: None.

Abstentions: None.

Motion passed.

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Lucia Chan gave a brief background of the Five-Year Strategic Plan and explained to Committee members that they are being asked to adopt/modify sections of the Plan that staff has identified and believed that pertained to the scope and responsibility of the Committee.

The following recommendations were made to modify parts of the Plan as follows:

1. Ensure that the Five-Year Plan includes language which connects in-school training to workforce needs particularly with the construction industry.
2. On page 11, the word "smaller" should be removed to include all employers.
3. On page 11, include the need for smaller employers for HR support which is currently provided by the Employer Advisory Council (EAC). The Five-Year Plan will tie directly the services that are provided by this committee and the WIB to those services provided by the Small Business Commission (SBC), and
4. On page 12, the word Committee in "EDD's Employer Advisory Committee" should be corrected to Employer Advisory Council. Pamela also emphasized that the entire Five-Year Strategic Plan is subject to public hearing. There will be additional opportunity for input before a recommendation is made to the WIB.

Motion to adopt the modification

Moved by Kes Narbutus and seconded by Ave Seltsam.

Ayes: Scott Hauge, Kes Narbutas, Ave Seltsam, Stan Warren.

Nays: None.

Abstentions: None.

Motion passed.

Greg Marutani discussed the San Francisco unemployment rate for the period Jan. 2000 – Aug. 2001 to provide additional insights into the downturn of our economy and the role of the WIB to respond to this challenge. He pointed out that unemployment rate for San Francisco has risen from the low of 2.5% in December 2000 to a high of 5.5% in August 2001. With the September 11th terrorist attack, the unemployment figures are likely to continue to increase more dramatically than expected. Greg will provide the unemployment data for September to members as soon as it is available.

Brenda Brown, staff of the PIC, gave a presentation on Rapid Response. She indicated that the Rapid Response Team consists of members from the Private Industry Council, Employment Development Department, City College and Union Representatives and sometimes, depending on the industry or the circumstances of the lay-offs, Community-Based Organizations. She also described the services provided by the Rapid Response Team: training possibilities, customized assessments, Labor Management, Unemployment Insurance information, and Labor Market Reports. She also described the concept of a WARN notice. Pamela pointed out that the PIC has exhausted all of the dislocated worker training allocation during the 1st quarter. As more lay-offs are anticipated, we are beginning to see a very grim picture in terms of lay-offs.

Members and guests are asked to give staff direction in assessing the impact of the September 11th terrorist attacks that exacerbates our economy as well as how we can make informed decision to get information to and from employers faster than the existing methods. Two main suggestions raised were that we should make sure that we are not duplicating efforts and that we need to "*connect the dots*". Irene Agnos feels that "*we need to develop the master*

partnership as outlined in the plan in getting jobs/ training for people and "connecting the dots." She feels that this Committee should continue this discussion at our next meeting.

Irene Agnos remarked that Lynn Bunim, Chair of the WIB, is very supportive of the concept of an Employer and Training Providers' Forum. However, she suggested that the Employer and Training Providers' Forum should be in the format of a series of smaller forums instead of a large one. The series should be a hands-on type allowing for more interaction between the panelist and audience. Lynn Bunim also recommended the Committee to form a small working group to get the "nuts and bolts" in place. The Chair will be contacting each member to see who would be interested in serving on this Planning Committee.

Motion to adopt the concept of the Employers and Training Providers' Forum
Moved by Ave Seltsam and seconded by Scott Hauge

Ayes: Scott Hauge, Kes Narbutas, Ave Seltsam, Stan Warren.
Nays: None.
Abstentions: None.

Motion passed.

Irene Agnos shared that Chair Nathan Nayman requested that the Committee meets at least once every month to at least six weeks.

Meeting adjourned at 10:50 a.m.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING

OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

EMPLOYER SERVICES COMMITTEE (ERC)

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FEB 13 2002

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Date: Thursday, February 21, 2002

Time: 9:00 A.M. – 10:30 A.M.

Location: Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

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Issued: Monday, February 11, 2002

Employer Services Committee

Agenda Item	Presenter	Time
1. Adoption of the Agenda (<i>Action Item</i>)	Nathan Nayman	2 min
2. Adoption of Minutes from the meeting held on September 28, 2001 (<i>Action Item</i>)	Nathan Nayman	2 min
3. Public Testimony of Agenda Items (<i>Discussion Item</i>)	Nathan Nayman	2 min
4. Employers & Training Providers Forum Series Planning (<i>Action Item</i>)*	Nathan Nayman, Lucia Chan	45 min
5. Public Testimony on Non-Agenda Items (<i>Discussion Item</i>)	Nathan Nayman	10 min
6. Proposed Meeting Dates (<i>Discussion Item</i>)*	Nathan Nayman Lucia Chan	5 min
7. New Business (<i>Discussion Item</i>)	Nathan Nayman	10 min
8. Adjournment (<i>Action Item</i>)	Nathan Nayman	1 min

* Materials Enclosed

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE OF THE WORKFORCE INVESTMENT BOARD **DATE:** FEBRUARY 11, 2002

FROM: NATHAN NAYMAN, CHAIRPERSON
EMPLOYER SERVICES COMMITTEE

SUBJECT: EMPLOYER AND TRAINING PROVIDERS FORUM SERIES PLANNING SESSION

At our September 28, 2002 committee meeting, we agreed to hold an Employers and Training Providers Forum series. There were several viewpoints among committee members regarding the actual format and other logistics of the forum series.

Our Board Chair envisioned this to be an interactive event. We would like your input on the format for the forum as soon as possible.

Please take a moment to review the draft. Please provide your feedback directly to Lucia via e-mail (lchan@sftaxcredits.com) or fax (415-431-8702) prior to Friday, February 15, 2002. We will review the comments and incorporate them for discussion at our next meeting.

If you have any questions prior to our meeting regarding this draft, please feel free to contact me at 415-956-9966 or Lucia at 415-431-8700 ext.269.

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

EMPLOYERS & TRAINING PROVIDERS FORUM PLANNING OUTLINE

Please complete and return to Lucia Chan prior to Friday, February 15, 2002.

I. TITLE: Proposed Name for Event (check one)

- ☐ San Francisco Workforce Conference;
- ☐ Planning for San Francisco's Workforce;
- ☐ Workforce Development San Francisco;
- ☐ Workforce Tomorrow;
- ☐ San Francisco's Workforce Action Planning Conference

Other Suggestion(s): _____

II. Number of Sessions:

Currently two sessions are proposed: one for Large (over 100 employees) and Medium size (50-100 employees) Businesses and a second session for Small Businesses (less than 50 employees)

Are more sessions needed ____ Yes ____ No

If yes, your suggestion(s): _____

III. Participants:

- Large & Medium Size Businesses – HR professionals to be invited (should we target specific Industry sectors?)
- Small Business Employers – Small business owners to be invited
- Training Providers (Community - Based Organizations and vendors on Eligible Training Providers List to be invited to both sessions.)

Should other representatives to be invited to either session: ____ Yes ____ No

If yes, who? _____

Should specific industries or sectors be invited/targeted? ____ Yes ____ No

If yes, which sector/industry and which representative (be specific)

- IV. SPONSORSHIPS:** The Small Business Commission is a co-sponsor of this event. Current projections are that an additional \$20,000 needs to be raised to pay for food, meeting facilitation and equipment rental. Please provide fundraising pledges and/or suggestions below:
-

V. SUGGESTED FORMAT FOR FORUM:

1. Continental Breakfast
2. Information Presentation on One Stop San Francisco System.
3. Breakout Workgroup Sessions and/or Panel Discussion – (please see Topics for Discussions below)
4. Working Lunch
5. Priority Recommendations and Conclusion (two priorities per workgroup)

Other Suggestion(s): _____

VI. TOPICS FOR DISCUSSION (Please number in order of priority to you):
For Large and Medium Size Employers Session of

___ **Marketing Outreach & Service Access**

- * How, where and to whom should One Stop services be marketed?
- * Employers access to workforce development services
- * Why should Employers use One-Stop Services?

___ **Communications Gap Between Employers and Training Providers**

- * What is the definition for job readiness?
- * What tools are useful to open communication between employers and jobs developers.

___ **Retention Support**

- * What are Employers' needs for Retention Support?
(Job Coaching, Customized Training, Career Ladder Training)

* *denotes examples*

Other Suggestions(s): _____

For Small Employers of Session (Please number in order of priority to you):

 Marketing, Outreach and Service/ Incentive Access

- * How, where and to whom should One-Stop services be marketed?

 Communications Gap Between small employers and Training Providers

- * What is the definition of job readiness?
- * What tools are useful to open communication between small employers and job developers?

 Customized Training & Skills Up-grade Training

- * What is necessary to make customized training, skills up-grade training, or incumbent workers training useful for small business employers?

 Retention Support

- * What are small employers needs in terms of Retention Support?
- * Childcare, Employee Development.

* *denotes examples*

Other Suggestions (s): _____

**Workforce Investment San Francisco
Employer Services Committee
2002 Proposed Meeting Dates**

Thursday, February 21, 2002

9:00 a.m. – 11:00a.m.



Thursday, March 21, 2002

9:00 a.m. – 11:00 a.m.



Thursday, April 25

9:00 a.m. – 11:00 a.m.



Tuesday, May 21, 2002

9:00 a.m. – 11:00 a.m.



Thursday, June 20, 2002

9:00 a.m. – 11:00 a.m.



Thursday, July 25, 2002

9:00 a.m. – 11:00 a.m.



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Local Workforce Investment Board for the City and County of San Francisco

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DRAFT MINUTES FOR THE MEETING ON

FEBRUARY 21, 2002 FOR THE

EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

APR 19 2002

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PRESENT:

Irene Agnos, William Allen (9:30), Kathye Citron, Scott Hauge, and Nathan Nayman.

ABSENT:

Corliss Fong, Kes Narbutas, Carol Piasente, John Poremba, Ave Seltsam, and Stan Warren.

STAFF:

Lucia Chan, Alice Chiu, Diane Harper, Greg Marutani, and Robert Schwab.

GUESTS (AS EVIDENCE BY THE SIGN-IN SHEET):

Judy Bloom, Dan Brajkovich, Donna Feingold, Don Hesse, Henry Lau, and Betty Webb.

Chair Nathan Nayman called the meeting to order at 9:15 AM. A quorum was not established. Chair Nayman asked the present members to introduce themselves. They were as follows:

- o Scott Hauge, Cal Insurance
- o Kathye Citron, Lifepoint
- o Irene Agnos, UCSF

Chair Nayman noted that action could not be taken in absence of a quorum. Mr. Nayman requested to move into the core discussion, the Employers and Training Providers Forum. Mr. Nayman had directed staff to prepare a summary of the responses from WIB members in regards to their input on the Forum for Employers and Training Providers. The purpose of the Forum is to bring people into a room and engage them to use the One Stop service or some service that would be beneficial in helping people to be trained appropriately and receive input on what employers are expecting from job seekers. With guidance of the staff, a survey was produced and sent to all forty-seven WIB members; however, only nine responses were received. Mr. Nayman asked Ms. Lucia Chan to present an overview of the aggregated information collected on the survey. Mr. Nayman added that he would like this discussion to be informal. "What we are trying to accomplish," he informed the Committee, "is to create a situation where the One Stop services and other WIB services are viable, valuable, and relevant." He also asked Mr. Scott Hauge to comment on the preparation of a similar seminar in Fresno.

Ms. Chan reviewed the aggregated responses of the survey item by item. The first item was the title of the event. The options were (accompanied by the number of votes):

San Francisco Workforce Conference: 1 vote
Planning for San Francisco's Workforce: 1 vote
Workforce Development San Francisco: 3 votes
Workforce Tomorrow: 2 votes

Other Suggestion(s): **None**

Chair Nayman welcomed other comments. He added that "workforce development" is fundamental; however, "workforce tomorrow" is more attractive. Ms. Kathye Citron asked what the goal is for the conference and suggested that the goal or mission statement could help drive the decision of the title. Ms. Chan responded that the mission is to basically bridge the gap between the employers and the employees. Mr. Nayman added that the goal is to make the services that the WIB is mandated to be relevant; to make sure the services are there and that they are seamless, usable and valuable; and to have a structure that is funded which is relevant to the people who use the services. Ms. Citron clarified that her question was intended to come up with slogans or titles that would attract employers who are not involved in the WIB to attend this seminar. She, as an employer, would like to attend the seminar knowing that the training providers are being trained to the employers' needs. Mr. William Allen suggested that "connections" could be a key word. Mr. Robert Schwab commented that this Forum would allow the employers to articulate on how the service could meet their needs and how the providers could train their clients the way the employers' needs. Mr. Nayman again reminded the Committee that this Forum's purpose is to make workforce development relevant to employers. Ms. Donna Feingold, Executive Director of Toolworks, suggested looking at East Bay Works.

Ms. Chan continued with the survey results. The second question was the number of sessions. Two sessions were proposed in the survey: one for Large (over 100 employees) and Medium size (50-100 employees) Businesses and a second session for Small Businesses (less than 50 employees). Question: Are more sessions needed? All seven answered "no". There was a suggestion to redefine small and large employers: 100 employees as med-large employers and fewer than 100 as small employers. There was a consensus among the Committee to accept the redefinition.

The third question was in regards to the participants. For the Large & Medium Size Businesses, the proposed invitees are HR professionals. For the Small Business Employers Forums, the proposed invitees are small business owners. Training Providers (Community-Based Organizations and vendors on Eligible Training Providers List) are to be invited to both sessions. Other representatives suggested by respondents to attend either sessions: State WIB, Small Business Administration, Economic Development, Community College, K-12 representatives, foundation staff, and city officials. Also specific industries or sectors suggested by respondents to be invited/targeted: Healthcare, hospitality, financial, high-tech, biotech and industries that are hiring. Mr. Nayman suggested contacting Small Business Commission and/or others for input on how to market to the small business owners. Ms. Citron also suggested having the San Francisco Chamber of Commerce involved in the marketing aspect.

Betty Webb, Coordinator of the Employer Advisory Council, wanted to know where EDD fits in. About 2/3 of her attendees are representatives from medium-size business. Chair Nayman requested staff to acquire EDD's mailing list and involvement to "get the word out."

William Allen strongly suggested that this Forum focus not on "now" but five years later to better prepare people for jobs in the future.

Chair Nayman asked for suggestions on how to target these industries. Ms. Webb suggested mailings. Mr. Allen suggested looking at security sector.

Mr. Nayman informed the Committee that UCSF plans to help sponsor the event but have not indicated an amount. Mr. Nayman noted, "We need to look for sponsorship. "

All the respondents agreed on the agenda format. One respondent suggested that the Forum end before noon. Ms. Webb seconded that. With her experience, seminars work better if they end before noon. People don't come back to the second half. Most employers who attend the EAC meetings are HRs representatives. Kathye Citron expressed her concern that she would like the Forum for large businesses to expand beyond HRs. There was a consensus among the Committee to keep the Forum to a half day.

Topic for discussion for med-large businesses: **Communications Gap Between Employers and Training Providers**. There were no other suggestions. For small business, **Customized Training & Skills Up-grade Training** received the most votes. A member suggested having a presentation on the difference between the PIC and the WIB.

Chair Nayman asked Mr. Scott Hauge to talk about his program held on Wednesday, February 27th in Fresno: "Preparing the Central Valley Workforce for the new economy" sponsored by the Fresno Chamber of Commerce, Fresno WIB and the California WIB. He asked Mr. Hauge to explain how this came about and the roles that the three sponsors played in promoting this event

Mr. Hauge is a member of the California State WIB and on the Small Business Group. The goal of the Fresno event was to make One Stop relevant. He stated that the plan is to do five forums this year to target the eight Central Valley counties. Key to success: what happens after the seminar. They keep in contact with the participants and keep them updated. Fresno Chamber of Commerce agreed to do the outreach. Message: WIB to be more economically developed. Currently there are fifty-four RSVP from small businesses and about twenty-five RSVPs from non-small businesses.

Mr. Nayman expressed his anticipation in getting this Forum started. He stated that he is relying on Ms. Agnos to reach out to the healthcare sectors, Mr. Hauge to small businesses, and others to contribute to different areas. He stated that he would like to make the Forum as interactive as possible.

Mr. Nayman stated that most large businesses do not consider using the One Stop. "What we try to do at this forum is to find out what it takes for these large businesses to use the One Stop," he said, "and make the One Stop an important service for everyone."

Greg Marutani stated that the focus of the Forum should be to provide information on what the employer's needs are so the training providers can train their clients accordingly. He expressed his concern about promoting the One Stop as the focus because One Stop may not be for everyone and if they (employers) get turned off there, then we've lost them.

Judy Bloom was concerned about getting the right people in the room. She suggested involving the SF Chamber of Commerce.

Bob agreed not to promote One Stop but to learn from the employer how One Stop can work for them and how the system should look.

The Committee could not take any formal action since a quorum was not present.

Mr. Nayman informed the Committee that he would work with staff to send out via email a draft program to Members, hoping to receive feedback. (Target dates for Forum: April 19 and 26.) He informed the Committee that he would talk with the San Francisco Chamber of Commerce to

sponsor the event Mr. Nayman directed staff to work with EDD to identify the top 40 big businesses' HR Directors. He also intends to ask SF Business Times to sponsor this event. He invited comments regarding the Forum from the Members.

Future Agenda Items

Mr. Allen requested data on available jobs and how many are looking for jobs.

The meeting was adjourned at 10:45 AM.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

EMPLOYER SERVICES COMMITTEE (ESC)

Date: Thursday, April 25, 2002
Time: 9:00 a.m. – 11:00 a.m.
Location: SF Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

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AGENDA APPEARS ON THE REVERSE SIDE

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To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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OTHER ACCOMMODATIONS

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Issued: Thursday, April 18, 2002

Proposed Agenda

1. Adoption of the Agenda (*Action Item*)
2. Adoption of the ^{see to} Minutes of the [✓] September 28, 2001 and the [✓] February 21, 2002 Meeting (*Action Item*)*
3. Public testimony on Agenda Items (*Discussion Item*)
4. Customized Training Recommendation for WIA Adult Set-Aside Fund (*Action Item*)*
5. Refined Planning Outline on Employers & Training Providers Forum Series (*Action Item*)*
6. Employer Services Committee Strategic 2002-2003 Plan (*Discussion Item*)*
7. Public Testimony on Non-Agenda Items (*Discussion Item*)
8. Adoption of Standing Meeting Calendar (*Action Item*)*
9. New Business (*Discussion Item*)
10. Adjournment (*Action Item*)

* Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE OF
THE WORKFORCE INVESTMENT BOARD

DATE: APRIL 17, 2002
DOCUMENTS DEPT.

FROM: NATHAN NAYMAN, CHAIRPERSON
EMPLOYER SERVICES COMMITTEE

APR 19 2002
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SUBJECT: CUSTOMIZED TRAINING RECOMMENDATION FOR WIA ADULT SET-
ASIDE FUND (AGENDA ITEM 4)

BACKGROUND

At the April 10, 2002 Executive Committee Meeting, the Program Resources Committee (PRC) made policy recommendations in relation to the 2002-2003 New Initiative Fund. One of the recommendations surrounds the Customized Training program (CT). Customized Training Program is "...training conducted with a commitment by an employer or group of employers to employ or advance an individual upon completion of the training. The employer is required to match the WIA investment in training at 50%."

The PRC recommended that when selecting customized training programs for WIA Adult formula investment, priority should be given to programs that:

1. Train for occupations and skill sets that are in high demand in the broader labor market, not only with the sponsoring employer.
2. Teach skills that are transferable to multiple occupations.
3. Make a commitment to recruit from the trained pool of applicants as new vacancies occur.
4. Have a cost of training that is low relative to the expected wages of trainees.
5. Have a greater potential for career advancement for trainees.
6. Present a 50% match that is cash, rather than in-kind.
7. Present a strategy for upgrading the skills of incumbent workers.
8. Present a plan for leveraging tax credits and other business assistance incentives that may be available.
9. Involve businesses with a track record of hiring graduates of PIC-funded training programs.

PRC reported several unresolved issues in relation to the implementation of this program:

1. What will the procurement process be for customized training? (Is an RFP or RFQ required? Will funding decisions be made on a rolling basis or once for the year? Should programs be limited to specific sectors or open to whomever applies?)
2. The WIB needs to adopt a new income eligibility threshold and self-sufficiency standard.
3. How do we promote the customized training opportunity to employers?

RECOMMENDATIONS:

The Customized Training program, if implemented properly and with enough funding set-aside, will greatly benefit San Francisco employers. I believe our feedback to the PRC is paramount to the successful implementation of this training program. Therefore, I recommend that the Employer Services Committee (ESC) supports the PRC's recommendations on Customized Training and request the following actions:

1. PRC set aside up to 1 million dollars in funding to support Customized Training.
2. PRC reports to the ESC on the policy recommendations and resolutions of the unresolved issues.
3. PIC staff be directed to develop implementing procedures to carry out the Customized Training Program.

I look forward to your feedback at our April 25th meeting. If you have any questions prior to this meeting, please contact Robert Schwab, Vice President of Youth Services at 415-431-8700.

WORKFORCE INVESTMENT SAN FRANCISCO

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Local Workforce Investment Board for the City and County of San Francisco

APR 19 2002

MEMORANDUM

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TO: EMPLOYER SERVICES COMMITTEE

DATE: APRIL 17, 2002

FROM: NATHAN NAYMAN, CHAIRPERSON

SUBJECT: REFINED EMPLOYERS AND TRAINING PROVIDERS FORUM SERIES PLAN
(AGENDA ITEM 5)

At our February 21st meeting, staff presented the aggregated responses of nine surveys from board members in regards to their input on the Forum. Although action could not be taken in absence of a quorum, valuable discussions and suggestions have taken place to help shape the structure of this important event.

From the last meeting, we arrived at several consensuses:

1. Forum series should be held in two sessions, one for small employers and one for medium and large businesses, to be held on two different half-days in the morning.
2. Redefine the definition of small employers to less than 100 employees, medium and large employers to be over 100 employees.
3. The title of the event should capture the forum objectives and be relevant to WIB mandated services.
4. Format of the Forum – Panel Discussion, or breakout workgroup sessions or a combination of the two.
5. Target specific industries in the medium-large employers session.
6. Training providers should be invited to both sessions.
7. More co-sponsorships are needed.

Adhering to the suggestions made, the following is staff's further refinement of the forum series outline for members' input and approval:

Recommended Two Half-Day Sessions

Staff received numerous concerns from Board Members and the general public that more time is needed to execute this forum series. Taking into consideration that the State WIB is hosting a small business workforce forum in June, and recognizing July and August to be vacation months, staff is proposing two new dates for the Forum Series: Friday, September 13th for medium and large businesses and Friday, September 20th for small businesses. Both sessions will be starting at 7:30 AM and will be ending at noon.

Recommended Titles of the Event

- a. "San Francisco – Workforce Tomorrow: Making Workforce Development Relevant"
- b. "Business on Board – Meeting Employers' Needs for a Skilled Workforce"
- c. "Where the Rubber Meets the Road – Training and Employing Tomorrow's Workforce"
- d. "Moving at the Speed of Business – Public Resources Enhance Business Development in San Francisco"

- e. "Workforce Empowerment – Employers Shaping the Future of Workforce Development"

Recommended Format

There are at least two options for Forum format that may be used separately, solely or in combination with each other.

1. Panel Presentations: This option requires advanced coordination by the moderator to ensure that panelists' remarks are well integrated and show varied perspectives on a central theme. The moderator also ensures smooth transitions and fields audience questions. Strong benefit of this format is the ability to hear more than one talking head and active audience interaction/ participation.
2. Working Groups/ Break-out Sessions: This method maximizes participant participation, but requires skilled facilitators to ensure that the sessions produce recommendations or results. Participants may be asked to select sessions in advance to ensure that only those topics of most interest are addressed. Some synthesis of the results of the various groups is required at the conclusion of the Forum.

Please see the attached Recommended Format

Committee Members are asked to decide on the following:

- a. Whether or not both of these format options should be used for the Forum.
- b. If goals of the Forum lend themselves more effectively to one of the format options.
- c. Consider changing the time allocation of the Forum (e.g. more time for Break Out Sessions, less time for speeches).
- d. Authorize Chair Nayman to invite and secure suggested speakers/ panelists.

Recommended Objectives of the Forum

1. Learn what methods employers currently use to recruit, retain and train employees (this goal can be facilitated by a pre-Forum survey of attendees)
2. Learn what jobs & skill requirements are expected to come in demand during 2002 and 2003. Of these jobs and skills requirement, how much will they contribute to new jobs at your firm?
3. Inform employers of workforce development incentives and services that are currently available and underutilized: tax credits, on-the-job- training opportunities, job fairs, and other One-Stop Services.
4. Identify workforce issues and learn how the WIB can serve the employer community better.

Recommended Specific Industry Sectors to be Targeted for the Medium – Large Employer Session

1. Airline & Transportation – United Airline
2. Hospitality – Huntington Hotel
3. Bio-tech – Signature Bio-Sign/UCSF
4. Healthcare – Kaiser Permanente
5. Retail – Macy's/ William Sonoma
6. Financial Services – Wells Fargo
7. Security – Corporate Security

Recommended Co-Sponsorship

Staff recommended that co-sponsorship be limited to employer groups such as the following:

1. San Francisco Chamber of Commerce
2. Minority Chambers (African-American, Hispanic, Asian)
3. Committee on Jobs
4. San Francisco Partnership
5. California Workforce Investment Board
6. San Francisco Small Business Commission
7. Small Business Network
8. Merchants' Association(s)

Recommended types of sponsorships:

1. Unrestricted Dollars
2. Staff Support
3. Mailing Lists and Advertising
4. Postage
5. Invitations
6. Programs
7. Food
8. Speakers and Small Group Facilitators

Next Steps:

1. Employer Services Committee to identify goals, adopt format and substance of Forum by end of April.
2. Mail "Save the Date" notice to invitees by the beginning of May.
3. Employer Services Committee to form Forum Planning Task Force by beginning of May.
4. WIB staff to present current outline of Forum to Small Business Commission at its May meeting to secure co-sponsorship of Forum.
5. Mail Sponsorship invitation letter from Chair Nayman to appropriate organizations by end of May.
6. Paul Pandergast & Associates or other professional event planner secured (by contract) by the end of May.
7. Authorize Chair Nayman to invite and secure speakers, panelists and moderators by end of June.

Thank you for your continual efforts and support in making this Forum a successful event. Staff will be available at the meeting on April ---- to answer questions. Should you have any questions prior to the meeting, please contact Robert Schwab at the Private Industry Council at 415-431-8700.

Attachments

Recommended Agenda
Large & Medium Employer Session

7:30 AM	REGISTRATION AND CONTINENTAL BREAKFAST
8:00 AM – 8:30 AM	<p>WELCOMING REMARKS Lynn Bunim, Chair Workforce Investment Board</p> <p>ATTRACTING & RETAINING WORKFORCE TALENT Derrick Barton, Chief Talent Officer, Center for Talent Retention (25 Minutes)</p>
8:30 AM – 9:15 AM	<p>PREPARING THE SAN FRANCISCO WORKFORCE FOR THE ECONOMIC REBOUND <i>Presentation: Current and Future Local Labor Market Outlook (15 minutes)</i> Proposed Presenter: John Crapo, San Francisco Chamber of Commerce</p> <p><i>Panel Presentation: Current Workforce Needs; Recruitment and Retention Strategies</i> Moderator: Nathan Nayman, Chair, Employer Services Committee</p> <p>Retail – Macy's / William Sonoma Financial Services – Wells Fargo Healthcare – Kaiser Permanente Biotech – Signature Bio-Sign/ UCSF Airline & Hospitality – United Airline / Huntington Hotel</p>
9:15 AM – 9:45 AM	<p>EFFECTIVE COMMUNICATION: SERVICE PROVIDERS TO TRAIN FOR EMPLOYER NEEDS <i>Panel Presentation – Training Needs for San Francisco Workforce for the Economic Rebound</i></p> <p>Moderator: ? Panelists – <i>Training Providers (Community Based Organizations, City College of San Francisco, Commercial Vendors) who have experience in employer based training including On-the Job-Training, and Individual Referrals to share their experiences.</i></p>
9:45 AM – 10:00 AM	Break
10:00 AM – 11:00 AM	<p>SOLUTIONS TO WORKFORCE NEEDS</p> <p>Moderator: ? <i>Break Out Sessions (see attached key questions)</i></p>
11:00 AM – 11:20 AM	<p>ONE-STOP PRESENTATION Pamela S. Calloway, President, Private Industry Council of San Francisco, Inc.</p>
11:20 – 12:00	<p>WRAP – UP SESSION: <i>What We've Learned and Next Steps</i> Moderator:?</p>

KEY QUESTIONS FOR BREAKOUT SESSIONS

1. What are your business workforce needs?
 - a. Do you have trouble recruiting and retaining workers? If so, what are the specific challenges?
 - b. Does your workforce require skills up-grade training or customized training?
 - c. Will your workforce be benefited from supportive services, e.g. childcare, transportation, job coaching?
2. How can Workforce Development providers better understand your needs?
3. What do you think of the One-Stop concept? How can the One-Stop centers help you meet your workforce needs?
(What specific employer/ business services would you like to see at the One-Stop?)
4. How may the One-Stop system better market its services to you?
5. Other workforce issues and concerns?
6. *We may add questions resulting from the pre-forum surveys that are not addressed above.*

*Recommended Agenda
Small Employers Session*

7:30 AM	REGISTRATION AND CONTINENTAL BREAKFAST
8:00 AM – 8:30 AM	<p>WELCOMING REMARKS</p> <p>Lynn Bunim, Chair Workforce Investment Board</p> <p>One-Stop Presentation: Pamela S. Calloway, President, Private Industry Council of San Francisco, Inc. (25 Minutes)</p>
8:15 AM – 8:35 AM	<p>PREPARING FOR THE SAN FRANCISCO WORKFORCE FOR THE ECONOMIC REBOUND</p> <p><i>Presentation: Current and Future Local Labor Market Outlook (15 minutes)</i></p> <p>Presenter: John Crapo, San Francisco Chamber of Commerce</p>
8:35 AM – 9:20 AM	<p><i>Panel Presentations: Show Me the Money – How to Reduce Your Hiring Costs and Increase Your Bottom Line</i></p> <ol style="list-style-type: none"> 1. Employer Based Training Services: On-the-Job-Training, Recruitment and Placement, Individual Referrals, & Rapid Response (15 Minutes) Presenter: Brenda Brown, Private Industry Council of San Francisco, Inc. 2. Tax Credits Available to San Francisco Employers (15 Minutes) Presenter: Lucia Chan, Private Industry Council of San Francisco, Inc. 3. Employer Testimonials: Mark Taylor, Thirsty Bear Brewing Co. Amir Kia, Hayes Valley Care Denise Newman, Massimo Catering
9:20 AM – 9:35 AM	Break
9:35 AM – 10:15 AM	<p>EFFECTIVE COMMUNICATION: <i>Service Providers to Train for Employers' Needs</i></p> <p>Moderator: ?</p> <p>Panel Presentation: Training Providers (Community Based Organizations, City College, and commercial vendors) to talk about their experiences in employer based training.</p>
10:15 AM – 11:15 AM	<p>SOLUTIONS TO WORKFORCE NEEDS – <i>Is One Stop a Solution?</i></p> <p>Moderator: ?</p> <p><i>Break Out Session (see attached key questions)</i></p>
11:15 AM – 12:00 PM	<p>WRAP – UP SESSION:</p> <p><i>What We've Learned and Next Steps</i></p> <p>Moderator:?</p>

KEY QUESTIONS FOR BREAKOUT SESSIONS

1. Do you have trouble recruiting and retaining workers? If so, what are the specific challenges?
2. What are your business workforce needs? How can workforce development providers better understand your needs?
(Does your workforce require skills up-grade training or customized training or employee supportive services?)
3. What do you think of the One-Stop concept? How can the One-Stop centers help you meet your workforce needs?
(What specific employer/ business services would you like to see at the One-Stop? Do you need one-on-one assistance in accessing tax credits?)
4. How may the One-Stop system better market its services to you?
5. Other workforce issues and concerns?
6. *We may add questions resulting from the pre-forum surveys that are not addressed above.*

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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MEMORANDUM

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TO: EMPLOYER SERVICES COMMITTEE

DATE: APRIL 17, 2002

FROM: NATHAN NAYMAN, CHAIRPERSON

SUBJECT: STRATEGIC PLAN OF 2002 – 2003 (AGENDA 6)

The Employers' Forum in September will help shape the scope of work for this Committee. Realizing that providing timely and quality services to our employer customers is essential, staff has prepared a list of recommendations to form an Employer Services Committee Strategic Plan. These recommendations are based on the parts of the San Francisco Strategic Five-Year Local Workforce Investment Plan that you have modified at our September 28, 2001 meeting and anticipated employers' needs and concerns that result from the Forum.

Attached is a draft Employer Services Committee Strategic Plan prepared by staff. Please prepare feedback on these recommendations for discussion at our next meeting. Staff will be available at the meeting on April 25th to answer any questions you may have.

Attachment

WORKFORCE INVESTMENT SAN FRANCISCO EMPLOYER SERVICES COMMITTEE DRAFT STRATEGIC PLAN

MISSION STATEMENT

Workforce Investment San Francisco's Business Services is dedicated to increase San Francisco employers' access to quality workforce and economic resources.

ONE YEAR GOAL

- Develop and implement a coordinated Employer Services Team
- Build more efficient and effective linkages between labor supply and demand
- Support and provide input to marketing materials

ONE-YEAR STRATEGIC OBJECTIVES

ONE YEAR GOAL: DEVELOP AND IMPLEMENT A COORDINATED EMPLOYER SERVICES TEAM.

1. By June 2002 Employer Services Committee to adopt a mandate for the Private Industry Council of San Francisco, Inc. to recruit business services representatives from One-Stop partnering agencies and form an Employer Services Outreach Team.*
2. By August 2002 Employer Services Outreach Team to produce an inventory of City-Wide workforce and economic development resources for employers.
3. By November 2002 Employer Services Outreach Team to take recommendations from the September Forum and develop plan to align existing services to employers' needs and identify gaps.
4. By December 2002 begin implementation of plan for employer services components into the One-Stop System.*
5. By December 2002 develop a single point of contact system for employers.*

ONE YEAR GOAL: BUILD MORE EFFICIENT AND EFFECTIVE LINKAGES BETWEEN LABOR SUPPLY AND DEMAND.

1. By July 2002 Employer Services Committee to hear presentation on results of Training Resource Mapping Project.
2. By September 2002 host an Employer and Training Provider's Forum.
3. By March 2003 implement mechanisms to identify profiles of San Francisco's labor supply and demand in the form of quarterly reports.
4. By April 2003 develop an ongoing process that will identify the current skill needs of the business community. The findings will be communicated to training providers, the education community, and employers.

ONE YEAR GOAL: SUPPORT AND PROVIDE INPUT TO MARKETING MATERIALS

1. By August 2002 obtain and review marketing materials from our partner agencies to determine what is being used, what is working, what isn't, and what is needed.*
2. By October 2002 develop recommendations to Marketing Workgroup of One-Stop Committee.*
3. By February 2003 develop 1-800 # for employers' one-stop access

** Requires collaboration with One-Stop Committee*

**Workforce Investment San Francisco
Employer Services Committee
2002 Meeting Dates**

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Thursday, February 21, 2002

9:00 a.m. – 10:30 a.m.

Community College District Office
33 Gough Street
Auditorium



Thursday, March 21, 2002 (cancelled)

9:00 a.m. – 11:00 a.m.

Macy's West Human Resources
35 O'Farrell Street
Training Room A



Thursday, April 25, 2002

9:00 a.m. – 11:00 a.m.

Community College District Office
33 Gough Street
Auditorium



Tuesday, May 21, 2002

10:00 a.m. – 12:00 noon

Community College District Office
33 Gough Street
Auditorium



Thursday, June 20, 2002

9:00 a.m. – 11:00 a.m.

Community College District Office
33 Gough Street
Auditorium



Thursday, July 25, 2002

10:00 a.m. – 12:00 noon

Community College District Office
33 Gough Street
Auditorium

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

EMPLOYER SERVICES COMMITTEE (ESC)

DOCUMENTS DEPT.

MAY 17 2002

SAN FRANCISCO
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Date: Tuesday, May 21, 2002
Time: 10:00 a.m. – 12:00 p.m..
Location: Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

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Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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OTHER ACCOMMODATIONS

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Issued: Wednesday, May 15, 2002

Proposed Agenda

1. Adoption of the Agenda (Action Item)
2. Adoption of the Minutes for the meeting held on April 25, 2002 (Action Item)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Sector Training Strategy (Discussion Item)
5. Refined Employers and Training Providers Forum Series Plan (Action Item)**
6. Strategic 2002 – 2003 Plan (Discussion Item)
7. Customized Training Update (Discussion Item)
8. Public Testimony on Non Agenda Items (Discussion Item)
9. Adoption of Standing Meeting Calendar (Action Item)
10. New Business (Discussion Item)
11. Adjournment (Action Item)

* *Information to be sent.*

** *Information enclosed.*

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE OF THE WORKFORCE INVESTMENT BOARD DATE: MAY 21, 2002

FROM: NATHAN NAYMAN, CHAIRPERSON
EMPLOYER SERVICES COMMITTEE

SUBJECT: REFINED EMPLOYERS AND TRAINING PROVIDERS FORUM SERIES
PLAN (AGENDA ITEM 5)

At our February 21st meeting, staff presented the aggregated responses of nine surveys from board members in regards to their input on the Forum. Although action could not be taken in absence of a quorum, valuable discussions and suggestions have taken place to help shape the structure of this important event.

From the last meeting, we arrived at several consensuses:

1. Forum series should be held in two sessions, one for small business employers and one for medium and large business employers, to be held on two different half-days in the morning.
2. Redefine the definition of small employers to less than 100 employees, medium and large employers to be over 100 employees.
3. The title of the event should capture the forum objectives and be relevant to WIB mandated services.
4. Format of the Forum – Panel Discussion, or breakout workgroup sessions, or a combination of the two.
5. Target specific industries in the medium-large employers session.
6. Training providers should be invited to both sessions.
7. More co-sponsorships are needed.
8. Forum series should emphasize creative dialogue and engaging the audience versus a didactic approach.

Adhering to the suggestions made, the following is staff's further refinement of the forum series outline for members' input and approval:

Recommended Two Half-Day Sessions

Staff received numerous concerns from Board Members and the general public that more time is needed to execute this forum series. Taking into consideration that the State WIB is hosting a small business workforce forum in June, and recognizing July and August to be vacation months, staff is proposing two new dates for the Forum Series: Friday, September 13th for medium and large businesses and Friday, September 20th for small businesses. Both sessions will be starting at 7:30 AM and will be ending at noon.

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Recommended Format

There are at least two options for Forum format that may be used separately, solely or in combination with each other.

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Committee Members are asked to decide on the following:

1. Whether or not both of these format options should be used for the Forum.
2. If goals of the Forum lend themselves more effectively to one of the format options.
3. Consider changing the time allocation of the Forum (e.g. more time for Break Out Sessions, less time for speeches).
4. Authorize Chair Nayman to invite and secure suggested speakers/ panelists.

Recommended Objectives of the Forum

1. Learn what methods employers currently use to recruit, retain and train employees (this goal can be facilitated by a pre-Forum survey of attendees)
2. Learn what jobs & skills requirement are expected to come in demand during 2002 and 2003. Of these jobs and skills requirement, how much will they be contributed to new jobs at your firm?
3. Inform employers of workforce development incentives and services that are currently available and underutilized: tax credits, on-the-job- training opportunities, job fairs, and other One-Stop Services.
4. Identify workforce issues and learn how the WIB can serve the Business community better.
5. Describe how the Workforce Development System can add value to the system and the local economy.
6. Describe our current services and track record, and how they have been helpful to businesses (eg. EDD services).

Recommended Specific Industry Sectors to be Targeted for the Medium – Large Employer Session

1. Airline & Transportation – United Airline
2. Hospitality – Huntington Hotel
3. Bio-tech – Genetech
4. Healthcare – Kaiser Permanente
5. Retail – Macy's/ William Sonoma
6. Financial Services – Wells Fargo
7. Security – Corporate Security

Recommended Co-Sponsorship

Staff recommended that co-sponsorship be limited to employer groups such as the following:

1. San Francisco Chamber of Commerce
2. Minority Chambers (African-American, Hispanic, Asian)
3. Committee on Jobs
4. San Francisco Partnership
5. California Workforce Investment Board
6. San Francisco Small Business Commission
7. Small Business Network
8. Merchants' Association(s)
9. Employer Advisory Council

Recommended types of sponsorships:

1. Unrestricted dollars
2. Staff Support
3. Mailing Lists and Advertising
4. Postage
5. Invitations
6. Programs
7. Food
8. Speakers and Small Group Facilitators

Next Steps:

1. Employer Services Committee to identify goals, adopt format and substance of Forum by end of May.
2. Mail "Save the Date" notice to invitees by the beginning of June.
3. Employer Services Committee to form Forum Planning Task Force by end of May.
4. WIB staff to present current outline of Forum to Small Business Commission at its May meeting to secure co-sponsorship of Forum.
5. Mail Sponsorship invitation letter from Chair Nayman to appropriate organizations by end of or middle of May.
6. Paul Pandergast & Associates or other professional event planner secured (by contract) by the beginning of June.
7. Authorize Chair Nayman to invite and secure speakers, panelists and moderators by end of June.

Thank you for your continual efforts and support in making this Forum a successful event. Staff will be available at the meeting on May 21st to answer questions. Should you have any questions prior to the meeting, please contact Robert Schwab at the Private Industry Council at 415-431-8700.

Attachments

Recommended Agenda
Large & Medium Employer Session

7:30 AM	REGISTRATION AND CONTINENTAL BREAKFAST
8:00 AM – 8:30 AM	<p>WELCOMING REMARKS Lynn Bunim, Chair Workforce Investment Board</p> <p>ATTRACTING & RETAINING WORKFORCE TALENT ?, Center for Talent Retention (25 Minutes)</p>
8:30 AM – 9:15 AM	<p>PREPARING THE SAN FRANCISCO WORKFORCE FOR THE ECONOMIC REBOUND <i>Presentation: Current and Future Local Labor Market Outlook (15 minutes)</i> Proposed Presenter: John Crapo, San Francisco Chamber of Commerce</p> <p><i>Panel Presentation: Current Workforce Needs; Recruitment and Retention Strategies</i> Moderator : Nathan Nayman, Chair, Employer Services Committee</p> <p>Retail – Macy's / William Sonoma Financial Services – Wells Fargo Healthcare – Kaiser Permanente Biotech – Signature Bio-Sign/ UCSF Airline & Hospitality – United Airline / Huntington Hotel</p>
9:15 AM – 9:45 AM	<p>EFFECTIVE COMMUNICATION: SERVICE PROVIDERS TO TRAIN FOR EMPLOYER NEEDS <i>Panel Presentation – Training Needs for San Francisco Workforce for the Economic Rebound</i></p> <p>Moderator: ? Panelists – <i>Training Providers (Community Based Organizations, City College of San Francisco, Commercial Vendors) who have experience in employer based training including On-the Job-Training, and Individual Referrals to share their experiences, discuss how they train for employers' needs, and how employers can access their services.</i></p>
9:45 AM – 10:00 AM	Break
10:00 AM – 11:00 AM	<p>SOLUTIONS TO WORKFORCE NEEDS</p> <p>Moderator: ? <i>Break Out Sessions (see attached key questions)</i></p>
11:00 AM – 11:20 AM	<p>ONE-STOP PRESENTATION Pamela S. Calloway President, Private Industry Council</p>
11:20 – 12:00	<p>WRAP – UP SESSION: <i>What We've Learned and Next Steps</i> Moderator:?</p>

KEY QUESTIONS FOR BREAKOUT SESSIONS

1. What are your business workforce needs?
 - a. Do you have trouble recruiting and retaining workers? If so, what are the specific challenges?
 - b. Does your workforce require skills up-grade training or customized training?
 - c. Will your workforce be benefited from supportive services, eg. childcare, transportation, job coaching?
2. How can Workforce Development providers better understand your needs?
3. What do you think of the One-Stop concept? How can the One-Stop centers help you meet your workforce needs?
(What specific employer/ business services would you like to see at the One-Stop?)
4. How may the One-Stop system better market its services to you?
5. Other workforce issues and concerns?
6. *We may add questions resulting from the pre-forum survey that are not addressed above.*

Recommended Agenda
Small Employers Session

7:30 AM	REGISTRATION AND CONTINENTAL BREAKFAST
8:00 AM – 8:30 AM	<p>WELCOMING REMARKS</p> <p>Lynn Bunim, Chair, Workforce Investment San Francisco Board</p> <p>One-Stop Presentation: Pamela S. Calloway, President, Private Industry Council of San Francisco, Inc (25 Minutes)</p>
8:15 AM – 8:35 AM	<p>PREPARING FOR THE SAN FRANCISCO WORKFORCE FOR THE ECONOMIC REBOUND</p> <p><i>Presentation: Current and Future Local Labor Market Outlook (15 minutes)</i></p> <p>Presenter: John Crapo, San Francisco Chamber of Commerce</p>
8:35 AM – 9:20 AM	<p><i>Panel Presentations: Show Me the Money – How to Reduce Your Hiring Costs and Increase Your Bottom Line</i></p> <ol style="list-style-type: none"> 1. Employer Based Training Services: On-the-Job-Training, Recruitment and Placement, Individual Referrals, & Rapid Response (15 Minutes) Presenter: Brenda Brown, Private Industry Council of San Francisco, Inc. 2. Tax Credits Available to San Francisco Employers (15 Minutes) Presenter: Lucia Chan, Private Industry Council of San Francisco, Inc. 3. Employer Testimonials: Mark Taylor, Thirsty Bear Brewing Co. Amir Kia, Hayes Valley Care Denise Newman, Massimo Catering
9:20 AM – 9:35 AM	Break
9:35 AM – 10:15 AM	<p>EFFECTIVE COMMUNICATION: <i>Service Providers to Train for Employers' Needs</i></p> <p>Moderator: ?</p> <p>Panel Presentation: Training Providers (Community Based Organizations, City College, and commercial vendors) to talk about their experiences in employer based training, how they train for employers' needs and how employers can access their services.</p>
10:15 AM – 11:15 AM	<p>SOLUTIONS TO WORKFORCE NEEDS – <i>Is One Stop a Solution?</i></p> <p>Moderator: ?</p> <p><i>Break Out Session (see attached key questions)</i></p>
11:15 AM – 12:00 PM	<p>WRAP – UP SESSION:</p> <p><i>What We've Learned and Next Steps</i></p> <p>Moderator: ?</p>

KEY QUESTIONS FOR BREAKOUT SESSIONS

1. Do you have trouble recruiting and retaining workers? If so, what are the specific challenges?
2. What are your business workforce needs? How can workforce development providers better understand your needs?
(Does your workforce require skills up-grade training or customized training or employee supportive services?)
3. What do you think of the One-Stop concept? How can the One-Stop centers help you meet your workforce needs?
(What specific employer/ business services would you like to see at the One-Stop? Do you need one-on-one assistance in accessing tax credits?)
4. How may the One-Stop system better market its services to you?
5. Other workforce issues and concerns?
6. *We may add questions resulting from the pre-forum surveys that are not addressed above.*

WORKFORCE INVESTMENT SAN FRANCISCO EMPLOYER SERVICES COMMITTEE DRAFT STRATEGIC PLAN

MISSION STATEMENT

Workforce Investment San Francisco's Business Services is dedicated to increase San Francisco employers' access to quality workforce and economic resources.

ONE YEAR GOAL

- Develop and implement a coordinated Employer Services Team
- Build more efficient and effective linkages between labor supply and demand
- Support and provide input to marketing materials

ONE-YEAR STRATEGIC OBJECTIVES

ONE YEAR GOAL: DEVELOP AND IMPLEMENT A COORDINATED EMPLOYER SERVICES TEAM.

1. By May 2002 Employer Services Committee to adopt a mandate for the Private Industry Council of San Francisco, Inc. to recruit business services representatives from One-Stop partnering agencies and form an Employer Services Outreach Team. *
2. By June 2002 Employer Services Outreach Team to produce an inventory of Citywide workforce and economic development resources for employers.
3. By November 2002 Employer Services Outreach Team to take recommendations from the September Forum and develop plan to align existing services to employers' needs and identify gaps.
4. By December 2002 begin implementation of plan for employer services components into the One-Stop System. *
5. By December 2002 develop a single point of contact system for employers. *

ONE YEAR GOAL: BUILD MORE EFFICIENT AND EFFECTIVE LINKAGES BETWEEN LABOR SUPPLY AND DEMAND.

1. By July 2002 Employer Services Committee to hear presentation on results of Training Resource Mapping Project.
2. By September 2002 host an Employer and Training Provider's Forum.
3. By March 2003 implement mechanisms to identify profiles of San Francisco's labor supply and demand in the form of quarterly reports.
4. By April 2003 develop an ongoing process that will identify the current skill needs of the business community. The findings will be communicated to training providers, the education community, and employers.

ONE YEAR GOAL: SUPPORT AND PROVIDE INPUT TO MARKETING MATERIALS

1. By August 2002 obtain and review marketing materials from our partner agencies to determine what is being used, what is working, and what isn't and what is needed.*
2. By October 2002 develop recommendations to Marketing Workgroup of One-Stop Committee.*
3. By February 2003 develop 1-800 # for employers' one-stop access

* Requires collaboration with One-Stop Committee

Employer Services Committee 1-Year Strategic Objective Implementation Timeline

	Strategic Objectives	Timeline
1	ESC to adopt a mandate for the Private Industry Council of San Francisco, Inc. to recruit business services representatives from One-Stop partnering agencies and form an Employer Services Outreach Team. *	By May 2002
2	Employer Services Outreach Team formed	By June 2002
3	ESC to hear presentation on results of Training Resource Mapping project.	By July 2002
4	Employer Services Outreach Team to produce an inventory of citywide workforce and economic development resources for employers.	By August 2002
5	Employer Services Outreach Team obtain and review marketing materials from our partnering agencies to determine what is being used, what is working, and what isn't and what is needed. *	By August 2002
6	Host an Employer and Training Provider's Forum	By September 2002
7	Develop recommendations to Marketing Workgroup of One-Stop Committee (see item #5)*	By October 2002
8	Employer Services Outreach Team to take recommendations from the September Forum and develop plan to align existing services to employers' needs and identify gaps.	By November 2002
9	Begin implementation of plan for employer services components into the One-Stop System. *	By December 2002

Strategic Objectives		Timeline
10	Develop a single point of contact system for employers*	By December 2002
11	Develop a 1-800 # for employers' One-Stop access	By February 2003
12	Implement mechanisms to identify profiles of San Francisco's labor supply and demand in the form of quarterly reports.	By March 2003
13	Develop an ongoing process that will identify the current skill needs of the business community. The findings will be communicated to training providers, the education community, and employers.	By April 2003

* *collaboration with One-Stop Committee required*



PRIVATE INDUSTRY COUNCIL
of San Francisco, Inc.

creating
employment
opportunities

May 3, 2002

Ms. Emily Stover DeRocco, Assistant Secretary
Employment and Training Administration
United States Department of Labor
200 Constitution Avenue, N.W.
Washington, D.C. 20210

Dear Assistant Secretary DeRocco:

Thank you for this opportunity to inform you of a way in which the Department of Labor can assist local areas to better engage employers in workforce development initiatives. As you have often reminded the employment training community, the *Workforce Investment Act* was designed for the two primary "customers": job seekers and employers.

In general, the legislation provides sufficient authority to develop, organize, and deliver services to both customers. However, it has recently become apparent that one provision of the "Final WIA Rules and Regulations" [i.e., 20 CFR §§ 661.350 (a)(10)] presents an overwhelming barrier to developing, organizing, and delivering services to employers. That provision requires that providers of training for both "customized training" and "on-the-job training" **only be procured competitively**.

Given the following facts, requiring these training providers to be procured competitively is inappropriate and inconsistent with the Act:

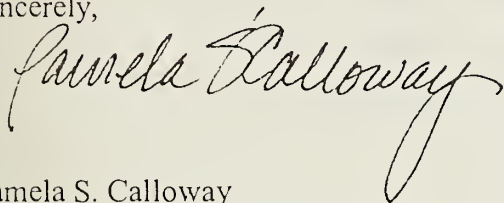
- Employers are required to provide joint financing for both kinds of training;
- Employers have their own specific schedules, terms, and conditions for that jointly-financed training; and
- It is reasonable for employers to expect they are entitled to negotiate directly and expeditiously for contracts to provide such training.

Therefore, the Private Industry Council of San Francisco, Inc., as agent for the partnership between the Mayor of San Francisco and the Workforce Investment San Francisco Board asks you to provide state and local administrators of WIA Programs with authority to procure all providers of "customized training" and "on-the-job training" on a "sole source" (or noncompetitive) basis.

There are precedents for that authority. The "Final WIA Rules and Regulations" [at 20 CFR §§ 667.105 (g)(2) and (3)] provide this authority but only to grantees, subgrantees, and contractors of "national demonstration, pilot, multiservice, research, and multistate projects" under sections 171 and 172 of the Act where there is joint financing. In addition, the rules and regulations for the 1992 Amendments to the *Job Training Partnership Act* [i.e., at 20 CFR §§ 627.422 (d)(1)(iv)] provided sole source procurement authority for all "on-the-job training" agreements.

The Workforce Investment San Francisco Board would like to encourage employers to avail themselves of customized training and on-the-job training services as quickly as possible. We respectfully request your earliest possible approval of this request.

Sincerely,

A handwritten signature in cursive script, reading "Pamela S. Calloway". The signature is written in dark ink and is positioned to the right of the word "Sincerely,".

Pamela S. Calloway
President

cc: Senior Staff

All Members, WISF Board and Committees

Armando Quiroz, Region VI, USDOL/ETA

Bill Burke, EDD

Virginia Hamilton, CWA

Joan Crigger, USCM

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**NOTICE OF A PUBLIC MEETING
OF THE
EMPLOYER SERVICES COMMITTEE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

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Date: Thursday, June 20, 2002
Time: 9:00 a.m. – 11:00 a.m.
Location: Community College District Office
Auditorium
33 Gough Street
San Francisco CA 94103

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Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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Issued: Thursday, June 13, 2002

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

PROPOSED AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
Thursday, June 20, 2002

1. Adoption of the Agenda (Action Item)
2. Adoption of the Minutes of the May 21, 2001 Meeting (Action Item)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Update on Caregiver Training Initiative Project (Discussion Item)*
5. Forum Planning Update and Presentation (Discussion Item/Action Item)*
 - a. Forum Taskforce Update
 - b. Center for Talent Retention
 - c. Small Business Commission's role on the Employer Forum
6. Revised Employer Services Committee Strategic 2002-03 Plan (Discussion Item/Action Item)*
7. Employer Services at EDD (Information Item)
8. Public Testimony on Non-Agenda Items (Discussion Item)
9. New Business (Discussion Item)
10. Adjournment (Action Item)

* Information to be sent at a later date.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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**DRAFT MINUTES OF THE
JUNE 20, 2002 MEETING OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

William Allen (9:30), Steve Arcelona, Scott Hauge, Nathan Nayman, Ave Seltsam, and Stan Warren

ABSENT:

Irene Agnos, Kathye Citron, Theresa Feeley, Corliss Fong, Kes Narbutas, and John Poremba

STAFF:

Lucia Chan, Alice Chiu, Greg Marutani

PUBLIC:

Derek Barton, Marisa Cassetta, Don Hesse, Gwen Kaplan, Mark Mak, Thomas Moseley, Ellouse Patton, Patricia Peretz, Lucy Scarbrough, Kevin Stange, and Betty Webb

The meeting was convened at 9:15 A.M. A quorum was established at 9:30 A.M.

Chair Nayman asked that the public testimony be taken at the time of the agenda item.

The Committee welcomed its newest member, Steve Arcelona who is the Chief of Staff at the San Francisco Department of Human Services.

Agenda Item 4 – Healthcare Update

Chair Nayman gave a brief update of the Healthcare project. To view the update memo, please visit PIC's website at www.picsf.org.

Scott Hauge asked what funding streams are used to fund this project. Chair Nayman replied he believes that it is funded by a combination of funding streams such as from the Budget Office and contributions from hospitals.

Mr. Hauge requested that there should be a report on the differentiation between the PIC stationary and WIB stationary. He pointed out that if PIC staff is being paid out of WIB money, WIB's letterhead should be used. He also referenced that a lot of the PIC around the State are renamed to WIB.

Greg Marutani tried to explain to the Committee that Joel is PIC staff, hence his memos are written on PIC letterhead. However, Chair Nayman felt that Mr. Hauge's concerns warrant a clearer explanation from staff and he recommended the following:

"Report back from staff, perhaps from Legal Counsel if it needs to be, as to the reasons why PIC and WIB exist the way that they do, explaining how the funding streams relate

to each other, and to ask the fundamental question: if funds from the WIB are being used the way they are being used, why the integration of the Private Industry Council the way that it is presented to us?"

Mr. Nayman requested that the report on the above question be on the agenda for the next Committee meeting, Executive Committee meeting, Board meeting, or whichever is the most appropriate setting for it.

Agenda Item 5 – Forum Planning

Forum Taskforce Update

Chair Nayman briefly updated the Committee on the work of the taskforce. To view the update memo, please visit PIC's website at www.picsf.org.

A quorum was established at 9:30 A.M.

Motion to adopt the agenda was moved by Steve Arcelona and seconded by William Allen.

Ayes: William Allen, Steve Arcelona, Scott Hauge, Ave Seltsam, and Stan Warren

Nays: None

Abstentions: None

Motion passed.

Motion to adopt the minutes from the meeting held on May 21, 2002 was moved by Scott Hauge and seconded by William Allen.

Ayes: William Allen, Steve Arcelona, Scott Hauge, Ave Seltsam, and Stan Warren

Nays: None

Abstentions: None

Motion passed.

Center for Talent Retention

Mr. Nayman introduced the co-founders of Center for Talent Retention (CTR), Derek Barton and Thomas Moseley.

Mr. Barton presented an overview of the planning for the Forums (i.e. the goals/vision, format). He then answered questions from the Committee and the public.

Chair Nayman shared that he hopes the outcome of the Forum would be valuable to the employers and help the Board appropriately reallocate funds where needed.

There were concerns about making promises that the WIB cannot meet. William Allen asked for assurance from CTR that the Forum will meet the needs of the small, medium and large businesses and also of employers that hire for entry-level positions and managerial positions.

Chair Nayman clarified that the CTR's role is to help identify the needs as conveyed at the Forum.

Small Business Commission

Gwen Kaplan sits on the Small Business Commission. She talked about the role of the SBC at the Forum.

Chair Nayman asked Ms. Kaplan her definition of success (of the Forum). Ms. Kaplan replied that it would be a success if the Forum served the diverse and separate small business community. There should be an effort to invite all representatives of the small business community to the Forum so that they can participate and provide input to help frame what needs to be done in order to help them receive the services that they need.

Employment Development Department (EDD)

Lucy Scarbrough and Marisa Cassetta provided an overview of the services available at EDD.

Agenda Item 6 – Strategic Plan

Lucia Hughes presented the proposed strategic plan of the Employer Services Committee. To view the plan, please visit the PIC's website at www.picsf.org. Staff will continuously asked for the Committee's guidance on the Plan. She asked that the Committee authorize staff to develop a training resource-mapping project.

Chair Nayman did not feel the Committee was the right place to ask for authorization to proceed with "what is supposedly already part of staff's job description or work plan". However, the Committee does support the activities of the work plan. Mr. Nayman requested for more information and asked that the information be brought to the next meeting.

New Business

Scott Hauge reminded everyone that the Regional Employer Forum is scheduled for June 26, 2002.

Motion to adjourn meeting was moved by Ave Seltsam and seconded by Steve Arcelona.

Ayes: William Allen, Steve Arcelona, Scott Hauge, Ave Seltsam, and Stan Warren

Nays: None

Abstentions: None

Motion passed.

Meeting was adjourned at 11:00 A.M.

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**NOTICE OF A PUBLIC MEETING
OF THE
EMPLOYER SERVICES COMMITTEE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

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33 Gough Street
San Francisco CA 94103

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Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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Issued: Wednesday, July 17, 2002

**PROPOSED AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
THURSDAY, JULY 25, 2002**

1. Adoption of the Agenda (*Action Item*)
2. Approval of draft minutes of the June 20, 2002 meeting (*Action Item*)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Forum Taskforce Update (Discussion Item)
5. Committee Strategic Plan (Discussion Item)
6. Public Testimony on Non-Agenda Items (Discussion Item)
7. New Business (Discussion Item)
8. Adjournment (*Action Item*)

* Information enclosed.

Committee members are welcome to attend a half-hour Forum Task Force meeting at the conclusion of the Committee meeting.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

DRAFT MINUTES OF THE 25 JULY 2002 MEETING OF THE EMPLOYER SERVICES COMMITTEE OF THE WORKFORCE INVESTMENT SAN FRANCISCO BOARD

The meeting was held in the Auditorium of the San Francisco Community College District Office located at 33 Gough Street, San Francisco California 94103.

PRESENT:

Nathan Nayman, Chair (10:16 A.M.); Irene Agnos, William Allen, Steve Arcelona, Theresa Feeley, Corliss Fong, John Poremba, and Stan Warren

ABSENT:

Kathye Citron, Scott Hauge, Kes Narbutas, and Ave Seltsam

STAFF:

Jenny Chen, Alice Chiu, Wes Dixon, Raymond Holland, and Lucia Hughes

GUESTS (AS EVIDENCE IN THE SIGN-IN SHEET):

Hal Adler, Mary Auber, Lisa Gray, Zach Hudson, John Liu, Kevin Stange, and Betty Webb

Vice Chair Irene Agnos convened the meeting at 10:15 A.M. with a quorum established. Ms. Agnos asked that public testimony be taken at the time of the agenda item. She asked if there was public testimony on non-agenda items. There was none.

Motion to adopt the agenda was moved by Stan Warren and seconded by William Allen.

Ayes: William Allen, Steve Arcelona, Theresa Feeley, Corliss Fong, John Poremba, and Stan Warren

Nays: None

Abstentions: None

Motion passed.

Motion to adopt the minutes of the meeting on June 20, 2002 was moved by John Poremba and seconded by William Allen.

Ayes: William Allen, Steve Arcelona, Theresa Feeley, Corliss Fong, John Poremba, and Stan Warren

Nays: None

Abstentions: None

Motion passed.

Chair Nayman arrived at 10:16; Ms. Agnos turned the meeting back to Mr. Nayman.

Agenda Item 4 – Forum Taskforce Update

Lucia Hughes gave a brief update of the Forum Taskforce's activities. There were four items of discussion and action:

1. Sponsorship letter. The Taskforce agreed that Lynn Bunim, the chair of the WISF Board should sign the letter. Ms. Hughes informed the Committee that a copy of the signed letter is provided in the Committee's packet. John Poremba asked who is included in the mailing list. Ms. Hughes replied that PIC's the mailing list would include employer contacts, especially those who are receiving tax credit information and services. Mr. Nayman added that the Taskforce would be sending the letters to their contacts. He encouraged Members

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to send the letter to their contacts as well. Mr. Poremba asked when is the deadline for sponsorships; Ms. Hughes replied August 23, 2002.

2. Registration fee. The Taskforce agreed on the following fees: small business forum, \$25.00 each; large business forum, \$35.00 each; and day of, additional \$10.00 surcharge. Ms. Hughes explained the lower fee for the small business forum is \$25.00 because the Small Business Commission had sponsored \$5,000 to the Forum. Mr. Nayman added that the reason for a registration fee is to confirm the participants' commitment and to add value to the Forum.
3. Small Business Facilitator. The Taskforce assigned Mr. Hauge to research possible local consultants/facilitators for the small business forum. William Allen asked if other WIBs are invited to the forums; the answer was yes.
4. Timeline. Ms. Hughes shared the forum timeline with the Committee. The timeline is attached to these minutes (Attachment A) and incorporated by reference hereinafter. They may also be viewed on the PIC's website at www.picsf.org.
5. Steve Arcelona asked who designed the questions on the "save the date" card and what is the purpose of the questionnaire. Mr. Nayman replied that PIC staff and the consultants for the large business forum developed the questions. Mr. Nayman added that the questionnaire was another tool to engage the public to share their opinions.

Agenda Item 5 – Committee Strategic Plan

Kevin Stange clarified his role to the WIB. He was first hired as a research analyst by the Department of Human Services (DHS). His contract has been renewed for another program year by DHS, PIC, and San Francisco Urban Institute to continue the employment mapping in San Francisco. He offered himself as a resource for research and asked for guidance on how he could use his research to implement the Committee's strategic plan for the next year.

Mr. Poremba encouraged Mr. Stange to have cooperative dialogue with the State Employment Department and to think beyond the provision of training resources. He suggested that there should be more involvement of small business services.

New Business

Mr. Poremba questioned why Mr. Hauge's request for a discussion about the differentiation between PIC and the WIB was not on the agenda. Mr. Nayman replied that it will be at the next meeting.

Chair Nayman informed the Committee that there would not be a meeting in August as scheduled; the Committee will reconvene in September. Ms. Hughes asked if staff may go directly to the forum taskforce if they have questions with regards to the Forum. Mr. Nayman suggested that there be a notice sent out when there is a taskforce meeting scheduled.

Motion to allow the Forum Taskforce to guide staff in preparation for the Forums was moved by Stan Warren and seconded by Steve Arcelona.

Ayes: William Allen, Irene Agnos, Steve Arcelona, Theresa Feeley, Corliss Fong, John Poremba, and Stan Warren

Nays: None

Abstentions: None

Motion passed.

Chair Nayman informed the Committee of a business tax increase proposal and that the legislation is available at Jake McGoldrick's office.

The meeting was adjourned at 11:00 A.M.

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Please note that the
Employer Services
Committee Meeting
scheduled for
Wednesday, October
23, 2002 has been
rescheduled for
Wednesday, October
30, 2002 from 9 a.m. to
11 a.m. at 33 Gough
Street.

DOCUMENTS DEPT.

OCT 23 2002

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
EMPLOYER SERVICES COMMITTEE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

DOCUMENTS DEPT.

OCT 25 2002

SAN FRANCISCO
PUBLIC LIBRARY

Date: Wednesday, October 30, 2002
Time: 9:00 a.m. – 11:00 a.m.
Location: Auditorium
Community College District Office
33 Gough Street
San Francisco CA 94103-

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

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To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.



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Issued: Thursday, October 24, 2002

**PROPOSED AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
WEDNESDAY, OCTOBER 30, 2002**

1. Adoption of the Agenda (*Action Item*)
2. Approval of draft minutes from the July 25, 2002 meeting (*Action Item*)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Report from Staff Regarding the Differentiation Between the Private Industry Council of San Francisco, Inc. and the Workforce Investment Board San Francisco (Information Item)
5. Employer Forums Report (Discussion Item)*
6. ESC Mid-Year Report (Discussion Item)*
7. Solutions Map – Usage and Application (Discussion Item)
8. Committee Strategic Plan (Discussion Item)*
9. Public Testimony on Non-Agenda Items (Discussion Item)
10. Future Agenda Items (Discussion Item)
11. Adjournment (*Action Item*)

* Information enclosed.

**Workforce Investment San Francisco Board
Business on Board Forum – Meeting Employers’ Needs for a Skilled Workforce
September 13, 2002 & September 20, 2002**

Participation Report

TABLE OF CONTENTS

1. OVERVIEW OF BOTH FORUMS	Page 2
2. LARGE & MEDIUM SIZE EMPLOYERS SESSION	Page 3
2.1 Overview of the Agenda	
2.2 Program Packets	
2.3 Participation Data	
2.4 Presentations	
2.4.1 Presentation One: San Francisco Outlook	
2.4.2 Presentation Two: Workplace Talent Situation	
2.4.3 Presentation Three: Workplace Best Practices	
2.4.4 Presentation Four: Solutions Map	
2.4.5 Presentation Five: Workout Sessions	
2.5 Large Business Forum Overall Evaluation	
3. SMALL EMPLOYERS SESSION.....	Page 12
3.1 Overview of the Agenda	
3.2 Program Packets	
3.3 Participation Data	
3.4 Presentations	
3.4.1 Presentation One: The Resident San Francisco Workforce	
3.4.2 Presentation Two: How to Attract, Engage & Retain Best Talent	
3.4.3 Presentation Three: Solutions Map	
3.4.4 Presentation Four: Workout Sessions	
3.5 Small Business Forum Overall Evaluation	
4. ACTION ITEM, RECOMMENDATIONS & ACCOMPLISHMENTS.....	Page 25
4.1 Action Items	
4.2 Recommendations for Future Events	
4.3 Accomplishments	
5. PARTICIPANTS’ CONTACT INFORMATION.....	Page 27

Section 1: Overview of both Forums

The Workforce Investment San Francisco Board (WISF Board) hosted its inaugural Employers and Training Providers Forum for large and medium businesses (businesses with over 100 employees) on Friday, September 13, 2002. The WISF Board and the San Francisco Small Business Commission co-sponsored a similar event for small businesses that was held on Friday, September 20, 2002. Both events were entitled, ***Business on Board – Meeting Employers’ Needs for a Skilled Workforce*** and they were held at the SBC Pacific Bell Yerba Buena Media Center in San Francisco.

The goals of the forums were to provide employers and training providers with (1) a deeper understanding of the current and future workforce, (2) workforce best practices and strategies for engaging and retaining the best talent, (3) resources available to assist them to attract, engage and retain tomorrow’s dynamic workforce, and (4) some of the Workforce Solutions that are currently available.

The workshop was planned to be highly interactive and to include

- presentations from experts in the field
- self-assessment exercises for participants
- lessons from the nation’s best workplaces
- best practice sharing of participants
- resource sharing
- networking, and
- opportunities for participants to give input to the WISF Board re: outstanding needs.

Section 2: Large Employers Session – September 13, 2002

2.1 Overview of the Agenda

The 4.5 hour forum (from 7:30 to 12:00 noon) was packed with activities. It began with a networking breakfast, followed by four presentations related to the workforce:

- ◊ The San Francisco Outlook was presented by John Crapo of the San Francisco Center for Economic Development,
- ◊ The Workplace Best Practices presentations were presented by representatives from three large companies in San Francisco:
 - Corliss Fong of Macy's shared her company's best practice on Developing a Mentoring Program,
 - Lisa Gray of University California of San Francisco presented on her organization's innovative strategy on Customized Training,
 - James Edwards of United Parcel Service shared his company's expertise on employee retention.
- ◊ *The Workplace Talent Situation* was presented by Derrick Barton of the Center for Talent Retention,
- ◊ *Solutions Map: San Francisco Workforce Development Solutions* was presented by Kevin Stange of the Department of Human Services.

After these presentations, participants could attend any one of the seven concurrent break-out sessions that were held:

- TechLadder – A Business Partner (San Francisco IT Consortium)
- Outplacement Transitional Services - Your Tax Dollars at Work (PIC, Inc.)
- Essential Employability Skills for New Hires and Existing Workforce (The Family School)
- Innovative Outsourcing Solutions (Toolworks)
- Customized Media Training to Enhance Productivity (Bay Area Video Coalition)
- Workforce Partnerships: Maximize Your ROI (SF Works)
- One-Stop Mass Recruitment Center - Start-ups and Initial Hiring (Mission Hiring Hall)

These sessions are designed to give participants the opportunity to get a more in-depth understanding of some of the services profiled on the Solutions Map.

2.2 Program Packets

Items included in the program packets are:

- A work book on Engaging and Retaining Employee Talent developed by the Center for Talent Retention
- A deck of Retention Cards developed by the Center for Talent Retention
- A Talent CD consists of all the presentations of the day.

- ❑ A Solutions Map – a map that profiles employer services provided by the WISF providers' network
- ❑ Useful information materials from event sponsors.

2.3 Participation Data

85 people participated in the Forum. Most participants were Employment Training Providers, with employers making up the next largest group. Also in attendance were staff from governmental agencies, employer organizations, and WISF Board Members. Lynn Bunim presided over the event; Pamela Callaway and Derrick Barton provided closing remarks.

Employers: 17

Employer Organizations: 3

City/State Agencies: 3

Employment Training Providers: 13

WISF Board Members: 6

17 Employers

- ❑ AppleOne
- ❑ Arcadia Health Care
- ❑ Banana Republic
- ❑ Bank of Canton of CA
- ❑ Chevron/Texaco
- ❑ Corporate Tax Incentives
- ❑ Home Depot
- ❑ Macy's
- ❑ Manpower
- ❑ McKesson
- ❑ Pier 39
- ❑ PricewaterhouseCoopers
- ❑ Ritz Carlton
- ❑ SBC Pacific Bell
- ❑ Targeted Management Inc.
- ❑ United Parcel Service
- ❑ USCF

3 Employer Organizations –

- ❑ Chamber of Commerce
- ❑ Committee on JOBS
- ❑ Small Business Commission

4 City/State agencies (also One Stop Partners) –

- ❑ Department of Rehabilitation
- ❑ Employment Development Department

- ❑ Mayor's Office of Community Development
- ❑ San Francisco Department of Human Services

13 Employment Training Providers (also One Stop Access Points) –

- ❑ Arriba Juntos
- ❑ Bay Area Video Coalition
- ❑ Catholic Charities
- ❑ City College of San Francisco (Contract Education Department)
- ❑ The Family School
- ❑ Goodwill Industries
- ❑ Mission Hiring Hall
- ❑ Northern California Service League
- ❑ San Francisco Works
- ❑ Self Help for the Elderly
- ❑ Toolworks
- ❑ Women in Action
- ❑ Young Community Developers

7 WISF Board/ Committee Members –

- ❑ Steve Arcelona
- ❑ Lynn Bunim
- ❑ Pamela Calloway
- ❑ Theresa Feeley
- ❑ Corliss Fong
- ❑ Nathan Nayman
- ❑ Victor Revenko

Also:

- ❑ BRIDGE Housing Corp.
- ❑ Center for Talent Retention
- ❑ Private Industry Council of San Francisco, Inc.
- ❑ Women in Action

2.4 PRESENTATION

2.4.1 Presentation One: San Francisco Outlook

Overview

John Crapo shared data on the outlook of the national, state and San Francisco Bay Area economies and leading indicators for the San Francisco economy. His data suggested a mixed outlook for the overall economy where signs of economic recovery are offset by the other unfavorable economic indicators. John also gave an overview of the role of the recently launched San Francisco Center for Economic Development; a collaboration between the San Francisco Chamber of Commerce, the Committee on JOBS, San Francisco Planning and Urban Research Association, and Municipal Fiscal

Advisory Committee. John explained that the mission of the Center is “To pursue economic development research, develop strategies and conduct services focused on business retention and attraction”. John shared with the audience a list of research projects that are already underway and services that have already been implemented. Throughout his presentation, participants asked pertinent questions about the San Francisco economy and its impact on the local workforce. Attendees were very engaged in these lively and informative discussions, a sign their interests are of the importance, and relevance of the information being presented.

In addition to the presentation, audience members were given a handout of his presentation. The topic covered was general in scope, but yet it created a lively dialogue and gave attendees a more in-depth knowledge of the important role that the Center plays on the economic vitality of the City.

Evaluation on the San Francisco Outlook Presentation

Participants were asked if they would like to see more on the San Francisco Economic Outlook, out of 74 evaluations received, 72 expressed interests to see more of this presentation.

2.4.2 Presentation Two: Workplace Talent Situation

Overview

Derrick Barton conducted three mini hands-on exercises with the entire group around “what’s the most critical to engage and retain talents”, “what are the strengths”, and “what are the opportunities”. The exercises provided a tool valuable to employers, job seekers and organizations seeking to match the two.

Please see attached data collected from 63 participants

Evaluation on Workplace Talent Situation

Participants were asked if they would like to see more on the Workplace Talent Situation, out of 74 evaluations received, 72 expressed interests to see more of this presentation.

2.4.3 Presentation Three: Workplace Best Practices

Overview

Company representatives from Macy's, University California of San Francisco, and United Parcel Service each presented on one workplace best practice for ten minutes followed by ten minutes of questions and answer at the end of all three presentations.

Best Practice Presentation 1:

Corliss Fong of Macy's presented her company's best practice on Developing a Mentoring Program entitled "Mentor Circle Program". Ms. Fong shared with the audience members the program background, description and the success measurements. A very comprehensive, well thought out presentation, which generated a lot of appreciation from participants on Macy's innovative employees retention program.

Best Practice Presentation 2:

Lisa Gray of University California of San Francisco (UCSF) shared UCSF's approach to partnering with community organizations to recruit from targeted neighborhoods and populations. Ms. Gray Discussed UCSF's ability to benefit from CBO providers' job readiness and basic skills training and their own internal career ladder programs.

Best Practice Presentation 3:

James Edwards of United Parcel Service shared UPS' strategy in employee retention entitled "No One Quits". He pointed how the negative effects of turnovers directly impact the quality of customer service at UPS. His dynamic presentation generated a lot of interests from audience members. Mr. Edwards discussed specific UPS practices including pre-application tours and orientations for job services and personalized responses to employee performance.

Best Practice Presentation Evaluation

Participants were asked if they would like to see more on the Workplace Best Practice presentations, out of 74 evaluations received, 74 expressed interests to see more of this presentation.

2.4.4 Presentation Four: Solutions Map: San Francisco Workforce Development Solutions

Overview

Kevin Stange presented the origin and purpose of having a Workforce Solutions Map for San Francisco employers. He walked participants through the tool itself, explaining how various categories were developed, and fielding attendees' questions and comments. The audience was very receptive to the tool, and was highly engaged throughout the presentation. Many people made thoughtful suggestions for distributing and improving this tool, which Kevin described as a 'work in progress'. The level of participation in this discussion indicated a high interest in the Solutions Map concept and an eagerness to further develop and broadly disseminate the tool in the near future.

Many training providers showed support of the Solutions Map concept. They regarded the Solutions Map as a great tool for them to showcase their valuable employer services.

This session was not evaluated

2.4.5 Presentation Five: Workout Sessions

Overview:

Participants could attend any one of the seven concurrent work-out sessions that were held:

- TechLadder – A Business Partner (San Francisco IT Consortium)

This workout session provided participants information on a new business partnership that SFITC will be undertaking. This partnership will provide small and large businesses with programs such as IT Training, Internships, qualified applicant pool for Job Placement and Skills Upgrade training.

Ernesto Rivas, the presenter of this workshop, also asked participants for their assistance in directing SFITC in determining the types of IT skills and training programs that will be in demand.

Although there were more participants from the training community than from the employer community, lots of good information was exchanged in this 50-minute workshop.

❑ Outplacement Transitional Services - Your Tax Dollars at Work (PIC, Inc.)

Presenter, Magdalena Campos shared information on dealing with downsizing and restructuring, such as services available to employers and employees, service access contact number, and other related resources.

Only two participants attended this workshop. However, it was very interactive and lots of good information were exchanged.

❑ Essential Employability Skills for New Hires and Existing Workforce (The Family School)

This workout session demonstrated to the participants how the Family School's STRIVE program makes individuals better employees. By targeting attitudinal barriers to employment, the STRIVE program trains potential employee's motivation, accountability, responsibility, and overall attitude to being a more effective employee. Employers are encouraged to hire graduates of the STRIVE program. Employers can also enroll existing employees in the STRIVE program.

Natalie Lopes gave an interactive workshop. Great information and discussions exchanged.

❑ Innovative Outsourcing Solutions (Toolworks)

The session provided employers with information and resources about how outsourcing with Toolworks can greatly benefit their company. The presentation demonstrated the benefits of this service by outlining improved employee efficiency, reduced turnover, reduced supervisory responsibilities, reduced liability and payroll-related costs.

A very result driven, informative and interactive workshop presented by Naomi Ryan. Naomi invited a former participant of Toolworks and now a business owner to share her experiences of the Outsourcing program as a participant and now as an employer using the service. More employers participation would have been ideal.

❑ Customized Media Training to Enhance Productivity (Bay Area Video Coalition)

This workshop informed audience members of the types of training such as multimedia and IT trainings, employee development and retention that are available to help employers to sustain employability and productivity. The workshop also discussed access to employment Training Panel funds for IT training.

Ms. Shutzer's presentation was highly interactive and informative. Great ideas exchanged.

□ Workforce Partnerships: Maximize Your ROI (SF Works)

This workshop imparted knowledge on how to partner with workforce agencies to maximize economic return on investment. Case studies of employers were presented to highlight the questions that companies should ask internally before entering into a workforce partnership.

Terri Feeley's informative workshop captured the audience's attention, and generated a lot of interests.

□ One-Stop Mass Recruitment Center - Start-ups and Initial Hiring (Mission Hiring Hall)

Described services available at MHH's One-Stop Mass Recruitment Center. This workshop was very informative and useful especially for start-ups companies.

Evaluation on Workout Sessions

Participants were asked if they would like to see more on the Workout Session Presentation, out of 74 evaluations received, 70 expressed interests to see more of this presentation.

On their evaluations, participants offered the following comments regarding this session:

- Lots of good information. but I felt a bit rushed. ..., maybe an all day program so we can attend more than one session.
- Very good, but maybe have fewer sessions
- It was good
- It would have been nice to be able to attend more than one session
- More time to attend more sessions
- Great session, but need more employer
- Good choices
- Good dialogue and networking with other sectors
- Great Breakout – SF Works! Examples illustrate benefits
- Wonderful opportunity to interact with other participants and put theory into practice

2.5 Large Business Forum Overall Evaluation: 74 received

98.6% responded positively to the overall event as participants indicated that it provided practical information and real solutions that will help with participants' workforce issues, concerns, or improvement plans. Also, their responses indicated that they would either attend or recommend that others attend future similar events.

Please note: the Solutions Map, facility, and forum logistics were not evaluated.

SECTION 3: SMALL EMPLOYERS SESSION SEPTEMBER 20, 2002

3.1 Overview of the Agenda

The 4.5 hour forum (from 7:30 to 12:00 noon) was packed with activities. It began with a networking breakfast, followed by three presentations related to the workforce:

- ◇ The Resident San Francisco Workforce was presented by Linda Clark of the U.S. Census Bureau,
- ◇ How to Attract, Engage, and Retain the Best Talent was presented by John Bouffard of Bouffard Associates,
- ◇ *The Solutions Map: San Francisco Workforce Development Solutions* was presented by Kevin Stange of the Department of Human Services

After these presentations, participants could attend any one of the five concurrent break-out sessions that were held:

- TechLadder – A Business Partner (San Francisco IT Consortium)
- Customized Media Training to Enhance Productivity (Bay Area Video Coalition)
- One-Stop Mass Recruitment Center- Start-ups and Initial Hiring (Mission Hiring Hall)
- Larkin Street Youth – How HIRE-up services can meet your short-term and long-term staffing needs

These sessions are designed to give participants the opportunity to get a more in-depth understanding of some of the services profiled on the Solutions Map.

3.2 Program Packets

Items included in the program packets are:

- A work book on Creating Exceptional Workplaces: How to Attract, Engage & Retain the Best Talent
- A Solutions Map – a map that profiles employer services provided by the WISF providers' network
- Useful information materials from event sponsors.

3.3 Participation Data

64 people participated in the Forum. Most participants were Employment Training Providers, with employers making up the next largest group. Also in attendance were staff from governmental agencies, employer organizations, and WISF Board Members. Lynn Bunim presided over the event; Pamela Callaway and Rosalie Bulach provided closing remarks.

Employers: 14

Employer Organizations: 2
City/State Agencies: 4
Employment Training Providers: 18
WISF Board / Committee Members: 4

13 Employers

- ☐ 450 Architects
- ☐ Advanced Etiquette
- ☐ Brownies Hardware
- ☐ Cal Insurance & Association
- ☐ Corporate Tax Incentives
- ☐ Kellner & Associates
- ☐ Manpower Inc.
- ☐ Name Finder
- ☐ Point West
- ☐ Targeted Management, Inc.
- ☐ TMC Development
- ☐ SBC Pacific Bell
- ☐ Wenworth, Hauser, and Violich

2 Employer Organizations –

- ☐ Bay Area Works
- ☐ San Francisco Small Business Commission

5 City/State agencies (also One Stop Partners) –

- ☐ Department of Rehabilitation
- ☐ Employment Development Department
- ☐ Mayor's Office of Community Development
- ☐ San Francisco Department of Human Services
- ☐ U.S. Census Bureau

18 Employment Training Providers (also One Stop Access Points) –

- ☐ Arriba Juntos
- ☐ Bay Area Video Coalition
- ☐ Bayview Safe Haven
- ☐ Career Resource Development Center
- ☐ Catholic Charities
- ☐ Community Vocational Enterprises, Inc.
- ☐ East Bay Works
- ☐ Haight Ashbury Food Program
- ☐ Hospitality Management Training Institute, Inc.
- ☐ Jewish Vocational Service
- ☐ The Korean Center
- ☐ Larkin Street Youth Services
- ☐ L.E.N. Institute
- ☐ Mission Hiring Hall
- ☐ San Francisco IT Consortium

- ❑ Swords to Plowshares
- ❑ Visitacion Valley Jobs, Education, & Training
- ❑ Young Community Developers

5 WISF Board/ Committee Members –

- ❑ Steve Arcelona
- ❑ Rosalie Bulach
- ❑ Lynn Bunim
- ❑ Pamela Calloway
- ❑ Darlene Rutkowski

Also:

- ❑ Bouffard & Associates
- ❑ League of Women Voters
- ❑ Private Industry Council of San Francisco, Inc.

Section 3.4 Presentations

3.4.1 Presentation One: The Resident San Francisco Workforce

Overview

Linda Clark presented a broad range of census data, with an eye for the particular information that would have implications for small business employers and workforce professionals. Throughout her presentation, participants were invited to discuss implications for the workforce around several particularly pertinent data points that were covered. Attendees were very engaged in these lively and informative discussions, a sign their interest and of the importance, and relevance of the information being presented. Participants' comments regarding implications for the workforce were recorded and are presented below.

In addition to the presentation, audience members were given a large amount of printed data and resource information. The topic covered was vast and could easily have lasted for a couple of hours. A lot was covered in the 45 minutes scheduled for this session. This presentation whet the appetite for those in attendance, most of whom seemed extremely interested in learning about and discussing this data further. Had there been more time, much dialogue would likely have ensued. As one audience member put it, *"Very important and relevant information for this topic. We need to know the population"*.

Census Topics Discussed and Participants' Comments

Census data: 30.5% of San Franciscans are 20-34 years of age

Implications for the workforce:

- Faster turnover: every 1-2 years change jobs
- Prefer higher salaries to bigger fringe packages
- Many employees are re-entering education later in life
- SF attracts transitional workforce: come here after college, check it out
- This age group gravitates to larger cities; is SF comparable with NY?

Census data: high education levels:

81.2 % of San Franciscans graduated from high school or above

45% have bachelor's degree or above

16.4% have graduate or professional degrees

Implications for the workforce:

- More competition for people who don't have a college degree
- Harder to find folks for lower paid positions
- Shift in skills in sector
- Many people with college degrees go to nonprofits, then leave (high level of altruism)
- Cost of living pushes people out of nonprofits
- 19% of population doesn't have high school diploma: providing training for such a large number of people is a huge job
- Implications for first-time labor force
- Many people who grew up here face increased competition
- We need to do a better job; businesses need to reach out to younger people to teach them how to develop a career
- 50% of workforce comes from outside of SF (therefore these numbers change)

These data points also garnered much attention from the audience:

- 36.8% of residents are foreign born -- language implications
- 25% of residents are less than proficient at speaking English -- need English in service industry
- 18% of residents are disabled
- 56% of the disabled are employed
- 28% of residents live in single-parent households
- 39% of residents live alone
- Average travel time to work is 31 minutes (for residents of SF working in SF)
- 23-28% of income is spent on housing

Census Presentation Evaluation

Participants who completed evaluation forms rated this presentation as follows:

	Excellent	Good	Fair	Unsatisfactory
Gained information of value to me	15	9	3	0
Facilitator's ability to present information	20	6	1	0
Facilitator's subject knowledge	23	3	1	0

On their evaluations, participants offered the following comments regarding this session:

- *Very important and relevant information for this topic. We need to know the population.*
- *Good job!*
- *Numbers concerning San Francisco alone without considering the whole metropolitan area, I do not consider accurate or really usable.*
- *Housing costs seemed low.*
- *Great comments and suggestions from the audience.*
- *Well organized, prepared; great information available to employers.*
- *Fascinating information.*
- *Knew her subject. Too vast of a subject for her to be able to relate in such a short time. Good information, but each subject seemed to stimulate more questions, so I felt wanting at the end.*
- *Very practical and a good foundation to assist employers, large and small, develop their own ideas on who and what they need.*
- *Excellent information; would enjoy more.*
- *She did a good job and had clearly put a lot of effort into her presentation.*
- *The economy in San Francisco in 2002 is an entirely different organism than the 2000 economy; information outdated; would have loved 2002 info (great idea to present census info), know this is not yet available.*
- *Okay, but data on computer slightly boring and dry way to start morning.*

3.4.2 Presentation Two: How to Attract, Engage & Retain the Best Talent

Overview

John Bouffard presented the *what, why* and *how* of building an exceptional workplace as a key strategy for attracting, engaging and retaining the best talent. In this highly interactive session, audience members were asked to articulate the characteristics of exceptional workplaces, identify the hidden costs of turnover, and discuss the essential elements of hiring strategically. This presentation was intended to provide hugely new information. Rather, John sought to draw out and bring conscious attention to concepts that most people already know – most people know what they want in a workplace and how they want to be treated by their boss. Because we often fail to pay full attention to these things as employers, it's critical that employers make their organizational culture and people management competencies more conscious and consistent in order to fully engage the workforce.

Audience members participated in the various discussions that ensued, and appeared interested and engaged in the subject. For some, however, the relevance for smaller businesses seemed elusive. Others pointed out that all businesses have a culture. John shared that it is critical that we be able to name the norms or values of our workplace culture in order to ensure we are hiring people who match that culture. A workbook was given to all participants that included a suggested reading list. During the workshop some time was allotted to enable people to identify the values they would want their workplace to embrace. Audience members were encouraged to do the self-assessment on their key competencies in people management as homework. With only an hour and ten minutes for this presentation, like the census presentation, it served to raise awareness and whet attendees' appetites for more information on the subject. The topics and comments that were discussed are presented below.

Topics Discussed and Participants' Comments:

Participants identified these *Characteristics of Exceptional Workplaces*:

- Great relationship with co-workers
- Shared set of Values
- Feeling of independence
- Being empowered, trusted to get the work done
- Ability to create and contribute in a unique way
- Authority to make decisions at each employee level
- Healthy, creative, respectful environment
- Visionary leaders
- Management takes action and walks the talk
- People are respected:
 - valued, praised for their contributions

- get performance feedback
- ability to provide input; employees' view, ownership
- people are trusted, not micro-managed
- Communication:
 - information shared directly, honestly between management and employees
 - environment of open exchange; two-way communication

Participants identified these *Hidden Costs of Turnover*:

- Advertising
- Loss of information/history
- Termination costs
- Lost productivity
- Pre-departure productivity loss
- Legal costs
- Hiring costs
- Retraining
- Quality suffers
- Time for interviewing
- Working extra increases overtime pay, stress, on-the-job injuries
- Impact on morale from losing co-workers
- Higher pay needed for new employees
- Opportunity costs
- Reputation in community for high-turnover
- Lost relationships with customers

Participants identified these *Elements of Strategic Hiring*:

- Top: Meaningful Individual Contribution
- Mentoring
- Training
- Orientation
- Decision to enter relationship
- Information for candidates – thorough, meaningful, relevant
- Make offer
- Interview
- Selection of hiring committee
- Recruiting strategies
- Define desired qualities, characteristics, skills
- Create right job match: what are you needing?
- Create right culture match
- What do you want done?
- What are your values? How can you contribute?
- Where are you going?

- Expressing your culture, vision, core values, core business
- Foundation: Knowing who you are; what your company is about

Participants contributed the following to a discussion about “How do you convey who you are as a business?”

- Know your culture and name it
- Articulate expectations of potential employees
- Value opinion through questions asked
- Wording or recruitment materials
- Referral inquiry
- Ask probing/open-ended questions
- Inform applicants of the company history, describe the environment
- Shadow interviewing
- Volunteer in organizations from where you want to recruit employees
- Offer internships

Participants were given a few minutes to write out their workplace values, working on their own. After doing so, some people shared with the audience the following values which they had identified:

- Integrity; Supportive work environment – personally and professionally;
- Responsibility; Respecting self and clients; Equity & Fairness

How to Attract, Engage & Retain Best Talent Evaluation

Participants who completed evaluation forms rated this presentation as follows:

	Excellent	Good	Fair	Unsatisfactory
Gained information of value to me	11	12	4	0
Facilitator's ability to present information	20	7	2	0
Facilitator's subject knowledge	19	7	3	0
Use of group discussion and participation	18	9	1	0

On their evaluations, participants offered the following comments regarding this session:

- *Not nearly enough time to cover the vast amount of what he could have covered.*
- *Great speaker and facilitator. I can use the handouts in my organization.*
- *Great workshop.*
- *Very enlightening, excellent skill-building to employers for retaining employees.*
- *A little too focused on large employers.*
- *Thoughtful and energizing presentation.*
- *Great speaker.*
- *Loved it. Just excellent reminders, incentives, ideas.*

- *I do some of this work, so the information was not unique, but the presentation helped me a lot. The group discussion was good, but would have been excellent had we scheduled enough time for all the presentations.*
- *Would have been more effective if he was speaking to me rather than his back to me. He lost my interest because of this. He also seemed more of a mediator rather than a presenter.*
- *A positive and interesting slant on this.*
- *Did not appreciate his standing in front of the second row and how, seemingly disregarding this first row of tables most of the time.*
- *Wonderful, dynamic – my favorite part. Fun and insightful.*

3.4.3 Presentation Three: Solutions Map: San Francisco Workforce Development Solutions

Overview

Kevin Stange presented the origin and purpose of having a Workforce Solutions Map for San Francisco employers. He walked participants through the tool itself, explaining how various categories were developed, and fielding attendees' questions and comments. The audience was very receptive to the tool, and was highly engaged throughout the presentation. Many people made thoughtful suggestions for distributing and improving this tool, which Kevin described as a 'work in progress'. The level of participation in this discussion indicated a high interest in the Solutions Map concept and an eagerness to further develop and broadly disseminate the tool in the near future. The comments and suggestions that were discussed are presented below.

Participants were also encouraged to complete a Solutions Map Feedback Form which was distributed. Three forms were collected during the Forum (their input is transcribed below), and attendees were encouraged to send completed forms and to email further suggestions to Robert Schwab at PIC or Kevin Stange following the Forum.

Participants' Comments and Suggestions

- Put five steps from PowerPoint presentation on the front cover of Solutions Map
- Make available on-line
- Enable users to add and remove organizations electronically
- Add the organization, HIRE UP
- Be explicit about the criteria used for inclusion on Solutions Map (e.g. low to no cost services that help train, build, recruit the workforce, etc.)
- Include the Chamber of Commerce and SCORE
- Include childcare referral information
- List programs explicitly
- Label if services are free or not to employers
- Add web pages for all participating organizations
- More background details should be available some where (e.g. web links to specific answers participating organizations submitted to questions in advance about their services for this audience)
- Training organizations can use same terms/categories to describe what they do
- Solutions Map is value-neutral and geared toward employer needs; it doesn't challenge people to think out of the box about their hiring

Solutions Map Feedback Forms – input received

- Include whether services are free or have a charge
- Current categories are helpful
- Include a link to companies' or organizations' Websites

- Be able to identify organizations that offer multiple services to the community
- I like the general categories but the bulleted points are very specific. I think a database search engine will work best with a simple marketing flyer to employees
- Add a category of needs for hiring short-term/temp and long-term
- Additional service needed: how to obtain marketing/advertising consulting help for small businesses to create a greater presence in the community
- Additional service needed: management training for tour/travel/hospitality industry (entry level, basic skill development)
- Additional service needed: interns available for the hospitality industry
- Ask employers which additional service they need

Solutions Map Presentation Evaluation

Participants who completed evaluation forms rated this presentation as follows:

	Excellent	Good	Fair	Satisfactory
Gained information of value to me	12	14	3	0
Facilitator's ability to present information	10	15	4	0
Facilitator's subject knowledge	16	12	2	0

On their evaluations, participants offered the following comments regarding this session:

- *Good for me as a nonprofit, but I don't know from a small business perspective if it need to be its own big session.*
- *Looking forward to updates, and loved the idea from one of the participants about linking to the solutions submitted by contributors in their entirety.*
- *This presentation was a bit murky. I was unclear as to the purpose and how, in particular, the Solutions Map would meet that need. Good start but could be more developed.*
- *Interesting.*
- *Great feedback and input from audience.*
- *Wonderful tool.*
- *As good as it could be, given it's a pilot.*
- *Needs to be expanded greatly. The format is fantastic.*
- *Excellent tool; good use of input from audience.*

3.4.4 Presentation Four: Workout Sessions

Overview

Following the three presentations, participants could attend any of four concurrent break-out sessions were held:

- TechLadder – A Business Partner (San Francisco IT Consortium)
- We're Here to Serve You: How HIRE-Up Services Can Meet Your Short-term and Long-term Staffing Needs (Larkin Street Youth Services)
- One-Stop Mass Recruitment Center- Start-ups and Initial Hiring (Mission Hiring Hall)
- Customized Media Training to Enhance Productivity (Bay Area Video Coalition)

These sessions are designed to give participants the opportunity to get a more in-depth understanding of some of the services profiled in the Solutions Map.

Workout Sessions Evaluation

Participants who completed evaluation forms rated this presentation as follows:

	Excellent	Good	Fair	Unsatisfactory
Gained information of value to me	15	8	3	0
Facilitator's ability to present information	18	10	4	0
Facilitator's subject knowledge	12	6	2	0
Use of group discussion and participation	12	10	3	0

On their evaluations, participants offered the following comments regarding this session:

- *I didn't find any of these, as described, to have any relationship to me or my work (attended no session)*
- *We will follow-up with them to further develop our relationship. (attended HireUp)*
- *I dropped in on most sessions.*
- *Too many service providers. Only one employer!*
- *Larkin Street Youth rocks!*
- *As a presenter, not too many employers were present for our purposes – lots of nonprofits.*
- *Wish there was more time. (a presenter)*
- *Great tool for small employers to know that this is available (Mission Hiring Hall).*
- *I knew a lot of this information (IT).*

3.5 Small Business Forum Overall Evaluation

- Need small business owners present, which is the hardest thing in the world to do. Seemed like only ten employers of whom many were tied into the system.
- *Excellent day – good dialogue and ideas and fun.*
- *Looking forward to follow-up sessions and linkages with more employers.*
- *Provide lunch.*
- *Increase variety of breakout sessions to include items for all categories of participants.*
- *We need to get more businesses involved! More networking time or group discussions would be good.*
- *Use optical or corded mouse to move slides by presenter or remote location. Direct more to employers' needs, less theory.*
- *Ask service providers to invite employers!*
- *Bring programs to small business meetings, such as chambers.*
- *Great use of my time. If event could be no cost, that would be great.*
- *Much too early in the morning.*

SECTION 4: ACTION ITEM, RECOMMENDATIONS & ACCOMPLISHMENTS

As an inaugural event, ***Business on Board – Meeting Employers’ Needs for a Skilled Workforce***, appeared to be a great success. It was an ambitious program and undertaking, with a solid turnout of 139 people combined for both sessions, which are made up of 27 employers, 26 Employer & Training Organizations, 5 Employer Organizations, 5 City/ State. Federal Agencies (also One-Stop partners) 8 WISF Board members and 6 “other” organizations; who on the whole seemed quite satisfied with what they learned and how their time was utilized.

On the evaluation forms received, in response to the question, *In the future, would you recommend similar events to others?*, Overall, 96% of those who responded to this question responded positively. Thus, the interest in similar future events is evident of a strong need and desire for such events, as well as a willingness to take the time to attend.

4.1 Action Items

Throughout the Forum a number of action items were identified, which are given below.

1. Form a group to identify small business skill set for hiring, and selection.
2. Form a committee that will determine how to make the most out of the Solutions Map – make it come alive.
3. Dialogue about should Solutions Map or other activities be used to increase awareness about niche workforce needs (e.g. disabled population).
4. Suggest brown bag activities at the Chamber of Commerce focused on a specific population that employers should look to hire
5. Convene a Solutions Map Forum in place of one of the Employer Services Committee meeting.
6. Invite private sector representatives that attended the Forum to become members of the WISF.

4.2 Recommendations for future events

- Many attendees had networking as a primary motivation for coming to this event. To aid them in feeling less isolated and gaining valuable information consider hosting regular and more frequent events that are shorter and focus on a single

topic (e.g. bi-monthly breakfast meetings centered around one speaker and networking).

- Create a steering committee that would meet regularly to develop the concept, decide on the content and vendors, promote the event, and refine the agenda throughout the planning process.
- Give Steering Committee at least ten months to plan the event.
- Have more diverse options when offering workout sessions.
- Invite more employers; develop a database of business owners for this purpose.
- For a half-day workshop, try to have fewer presentations (e.g. two) that have enough time to go more in-depth.
- Provide enough time for participants to complete Solutions Map Input Forms during the event itself, so more input will be received.
- Distribute event evaluation forms earlier in the Forum so participants can respond immediately following each presentation and to enable those who departed early to still give input.
- Schedule the event in October vs. September as it was extremely difficult to connect with key players during the summer vacation months of July and August.
- Outreach through the private sector relationship of Board members.
- Distinguish employers' feedback from training providers' feedback on evaluations.
- Get Board members, Committee members and Training Providers committed to each invite at least three employers to attend the Forum.
- Get Board and Committee members committed to assist in raising funds
- Combine the large and small employers' sessions into one.

4.3 Accomplishments:

- Developed and launched Solutions Map
- Created a better linkage between employers and training providers
- Showcased WIB's employer services

- Created a base-line for subsequent discussion about the WIB's employer engagement strategy, future forums and the direction/ revision of the Solutions Map.
- Generated a lot of support from employers, Board and Committee members, and network organizations for future employers' events.

SECTION 5: PARTICIPANTS ' CONTACT INFORMATION

Please see attachments 5.1 & 5.2

	Last Name	First Name	Organization	Address	City	State	ZIP	Phone	Fax	e-mail
1.	Parker	Richard	450 Architects	450 Clementina	San Francisco	CA	94103	(415) 546-0450	(415) 546-0550	richard@450architects
2.	Seid	Syndi	Advanced Etiquette	1168 Clay Street	San Francisco	CA	94108	(415) 346-3665	(415) 928-4641	syndiseld@att.net
3.	Roberts	Robin	Apple One	44 Montgomery Street, Suite 150	San Francisco	CA	94104	(415) 397-3201	(415) 397-3230	rroberts@appleone.com
4.	Normandin	Glenn	Arcadia Health Care	4200-18th Street, Suite 103	San Francisco	CA	94114	(415) 255-2880	(415) 255-6550	glenn@arcadiacare.com
5.	Alumada	Dalia	Aribajuntos	1850 Mission Street	San Francisco	CA	94103	(415) 487-3245	(415) 863-9314	dahumada@aribajuntos.org
6.	Diaz	Romulo	Aribajuntos	1850 Mission Street	San Francisco	CA	94103	(415) 487-3248	(415) 863-9314	rdiaz@aribajuntos.org
7.	Membreno	Noemi	Aribajuntos	1850 Mission Street	San Francisco	CA	94103	(415) 487-3253	(415) 863-9314	nmembreno@aribajuntos.org
8.	Montes	Ximena	Aribajuntos	1850 Mission Street	San Francisco	CA	94103	(415) 487-3247	(415) 863-9314	xmontes@aribajuntos.org
9.	Kam	Rita	Bank of Canton of CA	555 Montgomery Street	San Francisco	CA	94111	(415) 835-3376	(415) 989-0103	krista@bavc.org
10.	Bauer	Krista	Bay Area Video Coalition	2727 Mariposa St., 2nd Floor	San Francisco	CA	94110	(415) 558-2148	(415) 861-4316	helen@bavc.org
11.	Sam	Helen	Bay Area Video Coalition	2727 Mariposa St., 2nd Floor	San Francisco	CA	94110	(415) 558-2110	(415) 861-4316	helen@bavc.org
12.	Shutler	Michelle	Bay Area Video Coalition	2727 Mariposa Street	San Francisco	CA	94110	(415) 861-3282	(415) 861-4316	michelle@bavc.org
13.	Sklar	Rita	Bay Area Works	3826 Fruitvale Avenue	Oakland	CA	94602	(510) 482-6261	(510) 482-6261	bayareaworks@yahoo.com
14.	Haygood	Imani	Bayview Safe Haven	1395 Mendell Street	San Francisco	CA	94124	(415) 822-8895	(415) 824-3209	ihaygood@bayviewSAFEhaven.org
15.	Bouffard	John	Bouffard Associates	2234-15th Street	San Francisco	CA	94114	(415) 786-3734	(415) 255-7679	john@bouffardassociates.com
16.	Malhorta	Meera	Bouffard Associates	2234-15th Street	San Francisco	CA	94114	(415) 786-3734	(415) 255-7679	(415) 255-7679
17.	Omerad	Scott	Bouffard Associates	2234-15th Street	San Francisco	CA	94114	(415) 786-3734	(415) 255-7679	(415) 255-7679
18.	Alvarenga	Kimberly	BRIDGE Housing Corp.	One Hawthorne St., Ste. 400	San Francisco	CA	94105	(415) 989-1111	(415) 495-4898	(415) 495-4898
19.	Davis	Manya	BRIDGE Housing Corp.	One Hawthorne St., Ste. 400	San Francisco	CA	94105	(415) 989-1111	(415) 495-4898	(415) 495-4898
20.	Sao Pedro	Lara	BRIDGE Housing Corp.	One Hawthorne St., Ste. 400	San Francisco	CA	94105	(415) 989-1111	(415) 495-4898	(415) 495-4898
21.	Benson	Fran	Cal Insurance & Association	2311 Taraval Street	San Francisco	CA	94116	(415) 680-2103	(415) 680-2131	fbenson@cal-insure.com
22.	Scotton	Sayun	Career Resource Development Center	655 Geary Street	San Francisco	CA	94102	(415) 775-8880	(415) 775-8880	linhile@crdc.info
23.	Foo	Mylene	Catholic Charities	240 Golden Gate Avenue, Room	San Francisco	CA	94102	(415) 345-1290X254	(415) 345-9160	mfoo@ccastf.org
24.	Foo	Mylene	Catholic Charities	240 Golden Gate Ave., Rm. 100	San Francisco	CA	94102	(415) 345-1290X254	(415) 345-9160	mfoo@ccastf.org
25.	Barton	Demick	Center for Talent Retention	600 - 17th Street, Ste. 2800 S.	Denver	CO	80202	(720) 272-4243	(303) 418-1663	derickb@keeppeople.com
26.	Moseley	Thomas	Center for Talent Retention	600 - 17th Street, Ste. 2800 S.	Denver	CO	80202	(303) 995-6889	(303) 418-1663	thomas@keeppeople.com
27.	Revenko	Victor	Chevron Texaco WISF	16 Deer Park Avenue	San Rafael	CA	94901	(415) 453-3679	(415) 454-8719	revento@aol.com
28.	Balestreni	Katie	City College of San Francisco	800 Mission Street	San Francisco	CA	94103	(415) 267-6545	(415) 267-6536	kbalesir@ccsf.edu
29.	Liau	Pamela	City College of San Francisco	800 Mission Street	San Francisco	CA	94103	(415) 267-6545	(415) 267-6536	pliau@ccsf.edu
30.	Nayman	Nathan	Committee on JOBS/ WISF	235 Montgomery Street, 10th Floor	San Francisco	CA	94104	(415) 956-9966	(415) 544-0351	nnayman@sfbos.org
31.	Mecke	Quintin	Community Vocational Enterprises, Inc.	1425 Folsom Street	San Francisco	CA	94103	(415) 544-0424	(415) 544-0351	qmecke@cve.org
32.	Regan	Patrick	Community Vocational Enterprises, Inc.	1425 Folsom	San Francisco	CA	94103	(415) 544-0424	(415) 544-0351	pregan@cve.org
33.	Marquez	Joe	Corporate Tax Incentives Consulting, LLC	P.O. Box 1133	Rancho Cordova	CA		916-454-1306	(916) 454-0436	
34.	Marquez	Joe	Corporate Tax Incentives Consulting, LLC	P.O. Box 1133	Rancho Cordova	CA		916-454-1306	(916) 454-0436	
35.	Singh	Taz	Corporate Tax Incentives Consulting, LLC	P.O. Box 1133	Rancho Cordova	CA		(916) 337-3866	(916) 454-0436	
36.	Singh	Taz	Corporate Tax Incentives Consulting, LLC	P.O. Box 1133	Rancho Cordova	CA		(916) 337-3866	(916) 454-0436	
37.	Davidson	Maureen	Department of Human Services	P.O. Box 7988	San Francisco	CA	94120	(415) 557-6002	(415) 431-9270	maureen.davidson@sfgov.org
38.	Rutkowski	Darlene	Department of Rehabilitation	185 Berry Street, #180	San Francisco	CA	94107	(415) 904-7151	(415) 904-5996	drutkows@dor.ca.gov
39.	Rutkowski	Darlene	Department of Rehabilitation	185 Berry Street, #180	San Francisco	CA	94107	(415) 904-7151	(415) 904-5996	drutkows@dor.ca.gov
40.	Lovalvo	Maria	East Bay Works	2300 El Portal Drive	San Pablo	CA	94806	(510) 374-7450	(510) 374-7454	
41.	Archer	Mary	Employment Development Department	801 Turk Street	San Francisco	CA	94102	(415) 749-7575	(415) 749-7477	marcher@edd.ca.gov
42.	Cassetta	Marisa	Employment Development Department	801 Turk Street	San Francisco	CA	94102	(415) 749-7480	(415) 749-7477	mcassett@edd.ca.gov
43.	Scarborough	Lucy	Employment Development Department	801 Turk Street	San Francisco	CA	94102	(415) 749-7590	(415) 749-7476	lscarbo@edd.ca.gov
44.	Ruiz	Carmen	EP Latino Newspaper	3284-23th Street	San Francisco	CA	94110	(415) 648-1670	(415) 648-3385	sales@sflatino.com
45.	Bell	Jennifer	Glide Memorial	330 Ellis #609	San Francisco	CA	94102	(415) 674-6138	(415) 441-5651	jbell@glide.org
46.	Lewis	Alison	Haight Ashbury Food Program	270 Divisadero Street	San Francisco	CA	94107	(415) 503-4480	(415) 503-4482	alison@thefoodprogram.org
47.	Panlingbatan	Ramy	Hire-Ability	1234 Indiana Street	San Francisco	CA	94117	(415) 820-9675	(415) 920-6877	ramyp@hire-ability.org
48.	McGaughey	Patrick	Home Depot (Pacific Retail Partners)	3723 Haven Dr. #110	Menlo Park	CA	94025	(650) 716-2205	(650) 716-2207	
49.	Thomas	Mathew	Home Depot (World Connect, Inc.)	1 Crescent Way, Ste. 1106	San Francisco	CA		(415) 468-4900	(415) 468-6400	mat@wciusa.net
50.	Anderson	Karan	Hospitality Management Training Institute, Inc.	760 Market Street, Suite 1009	San Francisco	CA	94102	(415) 677-9717	(415) 677-9810	
51.	Sondergaard	Gerald	Hospitality Management Training Institute, Inc.	760 Market Street, Suite 1009	San Francisco	CA	94102	(415) 677-9717	(415) 677-9810	
52.	Peretz	Patricia	Jewish Vocational Service	77 Geary Street	San Francisco	CA	94108	(415) 782-6225	(415) 391-3617	pperez@att.net
53.	Kellner	Madeline	Kellner & Associates	10 Andreas Ct.	Novato	CA	94945	(415) 897-9440	(415) 898-1832	mrkellner@earthlink.net
54.	Bornemann	Jill	Kimco Staffing	120 Montgomery Street, #207/5	San Francisco	CA	94104	(415) 433-1018	(415) 252-0360	jeninst@earthlink.net
55.	Rynd	Nancy	L.E.N. Institute	1254 Market Street, #200	San Francisco	CA	94102	(415) 252-9059	(415) 252-9059	
56.	Caminos	Kirah	Larkin Street Youth Services	1154 Larkin Street	San Francisco	CA	94109	(415) 749-3847	(415) 749-5832	
57.	Gerrie	Amanda	Larkin Street Youth Services	1154 Sutter Street	San Francisco	CA	94109	(415) 749-3847	(415) 749-6832	amanagerie@larkinstreetyouth.org
58.	Campbell	Marilyn	League of Women Voters	2675 Pacific Avenue	San Francisco	CA	94115	(415) 922-5312		marilyn.campbell@malicity.com
59.	Fong	Corliss	Macy's/ WISF	P.O. Box 7888, Internal Box #28	San Francisco	CA	94102	(415) 954-6662	(415) 954-6662	clong@lds.com
60.	Adler	Hal	Manpower, Inc.	50 California, Suite 835	San Francisco	CA	94111	(415) 781-7171	(415) 781-4531	
61.	Adler	Hal	Manpower, Inc.	50 California, Suite 835	San Francisco	CA	94111	(415) 781-7171	(415) 781-4531	

62	Hudson	Zach	Manpower, Inc.	50 California, Suite 835	San Francisco	CA	94111	(415) 989-2302	(415) 781-4531	S
63	Hudson	Zach	Manpower, Inc.	50 California Suite 835	San Francisco	CA	94111	(415) 989-2302	(415) 781-4531	L
64	Lerma	Albert	Mayor's Office of Community Development	25 Van Ness Avenue Ste. 700	San Francisco	CA	94102	(415) 252-3134	Albert.Lerma@sfgov.org	S
65	Lerma	Albert	Mayor's Office of Community Development	25 Van Ness Avenue, Ste. 700	San Francisco	CA	94102	(415) 252-3134		L
66	Hooker	James	Mayor's Youth Employment & Education Program	1596 Post Street	San Francisco	CA	94109	(415) 202-7903	myeep@aol.com	S
67	Hooker	James	Mayor's Youth Employment & Education Program	1596 Post Street	San Francisco	CA	94109	(415) 202-7903	myeep@aol.com	L
68	Darmawan	Dini	McKesson Corps	1 Post Street #3275	San Francisco	CA	94104	(415) 983-8300		L
69	Marcos	Don	Mission Hiring Hall	288-Seventh Street	San Francisco	CA	94103	(415) 865-2105	marcosd@pacbell.net	S
70	Marcos	Don	Mission Hiring Hall	288-Seventh Street	San Francisco	CA	94103	(415) 865-2105	marcosd@pacbell.net	L
71	Mendoza	Cindy	Mission Hiring Hall	288-Seventh Street	San Francisco	CA	94103	(415) 865-2105	cmendoza_mhh@yahoo.com	S
72	Mendoza	Cindy	Mission Hiring Hall	288-Seventh Street	San Francisco	CA	94103	(415) 865-2105	cmendoza_mhh@yahoo.com	L
73	Bulach	Rosalie	Name Finder / Workforce Investment SF Board	160 Sansome Street, 4th Flr.	San Francisco	CA	94104	(415) 955-8585	rosalie@namefinder.com	S
74	Braynen	Larry	Northern California Service League	28 Boardman Place	San Francisco	CA	94103	(415) 863-2323	larry@norcal-serviceleague.org	L
75	Cohen	Dana	Pier 39	P. O. Box 193730	San Francisco	CA	94119	(415) 705-5407	dona@pier39.com	L
76	Rotter	Barbara	Point West	1700 Montgomery Street	San Francisco	CA	94133	(415) 433-6312	bktinos@yahoo.com	S
77	Lee	Russell	PricewaterhouseCoopers, LLP	333 Market Street	San Francisco	CA	94103		russell.m.lee@pwcglobal.com	L
78	Campos	Magdalena	Private Industry Council of SF, Inc.	745 Franklin Street, Suite 200	San Francisco	CA	94102	(415) 923-4237	mcampos@picsf.org	L
79	Jackson	Cedric	Private Industry Council of SF, Inc.	1800 Oakdale Avenue	San Francisco	CA	94102	(415) 970-7722	cedric_jackson@picsf.org	L
80	Li	Roy	Private Industry Council of SF, Inc.	3120 Mission Street	San Francisco	CA		(415) 401-4900	roy.li@ccsf.ca.us	L
81	Calloway	Pamela	Private Industry Council of SF, Inc.	745 Franklin Street 2nd Floor	San Francisco	CA	94102	(415) 923-4003	psalloway@picsf.org	S
82	Chiu	Alice	Private Industry Council of SF, Inc.	745 Franklin Street, Suite 200	San Francisco	CA	94102	(415) 923-6966	achiu@picsf.org	L
83	Chiu	Alice	Private Industry Council of SF, Inc.	745 Franklin Street 2nd Floor	San Francisco	CA	94102	(415) 923-4003	achiu@picsf.org	S
84	Hernandez	Robert	Private Industry Council of SF, Inc.	1650 Mission Street, Suite 300	San Francisco	CA	94103	(415) 431-8700	rhernandez@picsf.org	S
85	Hernandez	Robert	Private Industry Council of SF, Inc.	1650 Mission Street, Suite 300	San Francisco	CA	94103	(415) 431-8700	rhernandez@picsf.org	L
86	Hughes	Lucia	Private Industry Council of SF, Inc.	1650 Mission Street, Suite 300	San Francisco	CA	94103	(415) 431-8700	lhughes@sfaccredits.com	S
87	Hughes	Lucia	Private Industry Council of SF, Inc.	1650 Mission Street, Suite 300	San Francisco	CA	94103	(415) 431-8700	lhughes@picsf.org	L
88	Schwab	Robert	Private Industry Council of SF, Inc.	1650 Mission Street, Suite 300	San Francisco	CA	94103	(415) 431-8700	rhernandez@picsf.org	S
89	Schwab	Robert	Private Industry Council of SF, Inc.	1650 Mission Street, Suite 300	San Francisco	CA	94103	(415) 431-8700	rhernandez@picsf.org	L
90	Sullivan	Leonard	Private Industry Council of SF, Inc.	1650 Mission Street, Suite 300	San Francisco	CA	94103	(415) 431-8700	psalloway@picsf.org	S
91	Calloway	Pamela	Private Industry Council of SF, Inc./ WISF	745 Franklin Street, Suite 200	San Francisco	CA	94102	(415) 923-6966	psalloway@picsf.org	L
92	Kwok	Anita	Ritz Carlton Half Moon Bay	1 Miramontes Point Road	Half Moon Bay	CA	94019	(650) 712-7632	anita.kwok@ntzcartoon.com	L
93	Arcelona	Steve	S.F. Department of Human Services	P.O. Box 7988	San Francisco	CA	94120	(415) 557-6348	steve.arcelona@sfgov.org	S
94	Crapo	John	San Francisco Chamber of Commerce	235 Montgomery Street, 12th Floor	San Francisco	CA		(415) 217-5191	icrapo@sfbamber.com	L
95	Rivas	Ernesto	San Francisco IT Consortium	1500 Mission Street	San Francisco	CA	94103	(415) 575-2100	erivas@sfgoodwill.org	S
96	Rivas	Ernesto	San Francisco IT Consortium	1500 Mission Street	San Francisco	CA	94103	(415) 575-2100	erivas@sfgoodwill.org	L
97	Feeley	Theresa	San Francisco Works/ WISF	235 Montgomery Street, 12th Floor	San Francisco	CA	94104	(415) 217-5183	tfleeley@stworks.org	L
98	Bunim	Lynn	SBC Pacific Bell/ WISF	140 New Montgomery, #2244	San Francisco	CA	94105	(415) 537-3268	lynn.bunim@sbc.com	L
99	Bunim	Lynn	SBC Pacific Bell/Workforce Investment SF Board	140 New Montgomery, #2244	San Francisco	CA	94105	(415) 537-3268	lynn.bunim@sbc.com	S
100	Lau	Henry	Self Help for the Elderly	407 Sansome Street	San Francisco	CA	94111	(415) 982-9171	hennykwan@yahoo.com	L
101	Liu	John	Self Help for the Elderly	407 Sansome Street	San Francisco	CA	94111	(415) 982-9171		L
102	Mak	Mark	Self Help for the Elderly	407 Sansome Street	San Francisco	CA	94111	(415) 982-9171		L
103	Arcelona	Steve	SF Department of Human Services	P.O. Box 7988	San Francisco	CA	94120	(415) 557-6348	steve.arcelona@sfgov.org	L
104	Curtis	Catherine	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 558-4785	catherine_curtis@ci.sf.ca.us	L
105	Davidson	Maureen	SF Department of Human Services	P.O. Box 7988	San Francisco	CA	94120	(415) 557-6002	maureen.davidson@sfgov.org	L
106	Defiel	Kellin	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 557-5449		L
107	Fountila	Melody	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 557-5258	melody_fountila@ci.sf.ca.us	L
108	Hardeman	Roxie	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 558-5258	roxie_hardeman@ci.sf.ca.us	L
109	Hays	Florence	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 557-5635	florence_hays@ci.sf.ca.us	L
110	Hays	Robert	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 557-5278	robert_hays@ci.sf.ca.us	L
111	Hesse	Don	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 554-4057	don_hesse@ci.sf.ca.us	L
112	Jones	Alma	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 970-7718	alma_jones@ci.sf.ca.us	L
113	Moore	Briana	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 557-5456	briana_moore@ci.sf.ca.us	L
114	Perry	Laurelle	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 970-7701	laurelle_perry@ci.sf.ca.us	L
115	Santos	Bernadette	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 558-5297	bernadette_santos@ci.sf.ca.us	L
116	Stange	Kevin	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 557-8569	kevin_stange@ci.sf.ca.us	L
117	Vildavskala	Lola	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 558-1368	lola_vildavskala@ci.sf.ca.us	L
118	Wedemeyer	Bill	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 557-5489	bill_wedemeyer@ci.sf.ca.us	L
119	Whelley	James	SF Department of Human Services	170 Oils Street	San Francisco	CA	94103	(415) 557-6255	james_wheily@ci.sf.ca.us	L
120	Cornell	Stephen	SF Small Business Commission	1 Dr. Carlton B. Goodlett Pl.	San Francisco	CA	94102	415-753-2669		S
121	Steward	Seth	Small Business Commission	1 Dr. Carlton B. Goodlett Pl.	San Francisco	CA	94103	(415) 554-6134	seth.steward@sfgov.org	S
122	Yanez	Martha	Small Business Commission	1 Dr. Carlton B. Goodlett Pl.	San Francisco	CA	94103	(415) 554-6134	martha.yanez@sfgov.org	S
123	Alvarenga	Claudia	Swords to Plowshares	1063 Market Street	San Francisco	CA	94103	(415) 252-4788	calvarenga@swords-to-plowshares.org	S
124	Buse	Gary	Targeted Management Co, Inc.	2201 N. Olive Street	Santa Ana	CA	92735	(714) 382-4706		L

125. Spears	Charles	Targeted Management Co, Inc.	2201 N. Olive Street	Santa Ana	CA	92735	(714) 382-4706			S
126. Spears	Charles	Targeted Management Co, Inc.								L
127. Co	Brian	The Family School	3101 Mission St., #100	San Francisco	CA	94110	(415) 550-4173		www.thefamilyschool.org	L
128. Lopes	Natalie	The Family School	3101 Mission St., #100	San Francisco	CA	94110	(415) 487-9678		nintrepidone@aol.com	L
129. Santiago	Ramonita	The Family School	3101 Mission St., #100	San Francisco	CA	94110	(415) 550-4173		www.thefamilyschool.org	L
130. Kim	Julie	The Korean Center	1326 Post St.	San Francisco	CA	94109	(415) 441-1881			L
131. Gasner	Emily	TMC Development	611 Front Street	San Francisco	CA	94111	(415) 989-8855		emily@fmc.com	S
132. Feingold	Donna	Toolworks	1119 Market St., Suite 300	San Francisco	CA	94103	(415) 621-8665		dfeingold@toolworks.org	L
133. Marzell	Tina	Toolworks	1119 Market St., Suite 300	San Francisco	CA	94103	(415) 621-8665		tmazell@toolworks.org	L
134. Ryan	Naomi	Toolworks	1119 Market St., Suite 300	San Francisco	CA	94103	(415) 621-8665		nryan@toolworks.org	L
135. Clark	Linda	U.S. Census Bureau	N/A	San Francisco	CA	94103	(510) 530-3382		linda2002clark@aol.com	S
136. Gray	Lisa	UCSF	3333 California, Ste. 16	San Francisco	CA	94143	(415) 514-2651		lgray@cgr.ucsf.edu	L
137. Neuberger	Sieve	UCSF	3333 California, Ste. 16	San Francisco	CA	94143	(415) 476-3276		sneuberger@cgr.ucsf.edu	L
138. Chiu	Jeffrey	UCSF Medical Center	2233 Post Street, Suite 302	San Francisco	CA	94115	(415) 353-4930		jeffrey.chiu@ucsfmedctr.org	L
139. Edwards	James	United Parcel Services	2222 - 17th Street	San Francisco	CA	94103	(415) 252-4501 x2148			L
140. Fleming	Larry	Visitation Valley Jobs, Education & Training	333 Schwertin Street	San Francisco	CA	94134	(415) 239-2866		vvjet94134@aol.com	S
141. Taoka	Evelyn	Wentworth, Hauser and Violich	353 Sacramento, #600	San Francisco	CA	94111	(415) 981-6911			S
142. Wong	Cheryl	Wentworth, Hauser and Violich	353 Sacramento, #600	San Francisco	CA	94111	(415) 981-6911			S
143. Nemsick	Karen	Women in Action	P.O. Box 410293	San Francisco	CA	94141	(415) 412-7617		karen@womeninaction.org	L
144. Stange	Kevin	Workforce Investment San Francisco Board	170 Otis Street	San Francisco	CA	94103	(415) 557-6569		kevin_stange@clsf.ca.us	S
145. Coleman	Ariane	Young Community Developers	4445 - 3rd Street	San Francisco	CA	94124	(415) 822-3491			L
146. Patton	Ellouise	Young Community Developers	1715 Yosemite Avenue	San Francisco	CA	94124	(415) 822-3491		yedpatton@hotmail.com	S
147. Patton	Ellouise	Young Community Developers	1715 Yosemite Avenue	San Francisco	CA	94124	(415) 822-3491		yedpatton@hotmail.com	L
148. Allman	Richard		109 Gates Street	San Francisco	CA	94110	(415) 821-0951		r-allman@packbell.net	S
149. Middleton	Deborah									L

Regular text indicates large employer forum

Bold text indicates small employer forum

This list is sorted by organization. It provides an indicator of which organizations were represented at both sessions.

Employer Services Committee 1-Year Strategic Objective Implementation Timeline

	Strategic Objectives	Timeline
1	ESC to adopt a mandate for the Private Industry Council of San Francisco, Inc. to recruit business services representatives from One-Stop partnering agencies and Committee of Community Agencies to form an Employer Services Outreach Team.*	By May 2002
2	Employer Services Outreach Team formed	By June 2002
3	ESC to hear presentation on results of Training Resource Mapping project.	By July 2002
4	Employer Services Outreach Team to produce an inventory of city-wide workforce and economic development resources for employers.	By August 2002
5	Employer Services Outreach Team obtain and review marketing materials from our partnering agencies to determine what is being used, what is working, and what isn't and what is needed.*	By August 2002
6	Host an Employer and Training Provider's Forum	By September 2002
7	Develop recommendations to Marketing Workgroup of One-Stop Committee (see item #5)*	By October 2002
8	Employer Services Outreach Team to take recommendations from the September Forum and develop plan to align existing services to employers' needs and identify gaps.	By November 2002
9	Begin implementation of plan for employer services components into the One-Stop System.*	By December 2002
10	Develop a single point of contact system for employers*	By December 2002

Strategic Objectives		Timeline
11	Develop a 1-800 # for employers' One-Stop access	By February 2003
12	Implement mechanisms to identify profiles of San Francisco's labor supply and demand in the form of quarterly reports.	By March 2003
13	Develop an ongoing process that will identify the current skill needs of the business community. The findings will be communicated to training providers, the education community, and employers.	By April 2003

** collaboration with One-Stop Committee required*

WORKFORCE INVESTMENT SAN FRANCISCO EMPLOYER SERVICES COMMITTEE DRAFT STRATEGIC PLAN

MISSION STATEMENT

"To ensure that the SF workforce development system is responsive to the needs of the employer community and is coordinated with the city's economic development efforts."

ONE YEAR GOAL

- Develop and implement a coordinated Employer Services Team
- Build more efficient and effective linkages between labor supply and demand
- Support and provide input to marketing materials

ONE-YEAR STRATEGIC OBJECTIVES

A. ONE YEAR GOAL: DEVELOP AND IMPLEMENT A COORDINATED EMPLOYER SERVICES TEAM.

1. By June 2002 PIC Staff to produce an inventory of City-Wide workforce and economic development resources for employers (The Solutions Map).
2. By November 2002 PIC Staff to take recommendations from the September Forum and develop plan to align existing services to employers' needs and identify gaps.
3. By December 2002 begin implementation of plan for employer services components into the One-Stop System.*
4. By December 2002 develop a single point of contact system for employers.*

B. ONE YEAR GOAL: BUILD MORE EFFICIENT AND EFFECTIVE LINKAGES BETWEEN LABOR SUPPLY AND DEMAND.

1. By July 2002 Employer Services Committee to hear presentation on results of Training Resource Mapping Project.
2. By September 2002 host an Employer and Training Provider's Forum.
3. By March 2003 implement mechanisms to identify profiles of San Francisco's labor supply and demand in the form of quarterly reports.
4. By April 2003 develop an ongoing process that will identify the current skill needs of the business community. The findings will be communicated to training providers, the education community, and employers.

C. ONE YEAR GOAL: SUPPORT AND PROVIDE INPUT TO MARKETING MATERIALS

1. By August 2002 obtain and review marketing materials from our partner agencies to determine what is being used, what is working, and what isn't and what is needed.*
2. By October 2002 develop recommendations to Marketing Workgroup of One-Stop Committee.*
3. By February 2003 develop 1-800 # for employers' one-stop access

** Requires collaboration with One-Stop Committee*

ⁱ Changes from last draft are explained below

ⁱ Deleted section A #1 from last draft which stated: "By May 2002 Employer Services Committee to adopt a mandate for the Private Industry Council of San Francisco, Inc. to recruit business services representatives from One-Stop partnering agencies and Committee of Community Agencies and form an Employer Services Outreach Team".

ⁱⁱ Section A #2 changed "Employer Services Outreach Team" from last draft to "PIC Staff"

ⁱⁱⁱ Section A #3 same as above

Employer Services Committee Mid-Year Report Outline

The Committee has met 7 times since its inception (not including the Oct. 23 meeting), its major activities are listed below:

- Received overview on Employer Services at the PIC (Tax Credit and LMI)
- Considered and discussed a proposed Strategic Plan (see attachment)
- Modified sections of the San Francisco Strategic Five-Year Plan that pertained to the scope and responsibility of employer services in San Francisco.
- Received Rapid Response Presentation
- Received overview of the Healthcare Workforce Initiative
- Spearheaded the effort to ask the Board to allocated dollars to fund the Customized Training program.
- Designed, implemented, and executed two Employers' forums which featured:
 - Presentations from nationally recognized talent attraction and retention experts;
 - Best practice presentations from three large employers in San Francisco, and
 - A diverse selection of breakout sessions presented by some of San Francisco's employment and training providers' network.

Countless efforts in fundraising, coordination, and collaboration are components that contributed to the overall positive outcome.

As a result of the forums the Committee accomplished the following:

- Created a tighter linkage between the Board and the employer community.
- Created and launched Solutions Map – a quick guide on employer services provided by the WISF Board's network of service providers.
- Showcased WIB employer services
- Created a base-line for subsequent discussion about the WIB's employer engagement strategy, future forums and the direction/ revision of the Solutions Map.

- Generated support from employers, Board and Committee members, and training providers' organizations for future employers' events.
- Increased private sector awareness of the WISF Board and local workforce development network.

Next Steps:

1. Develop formal relationships with economic development agencies such as the Mayor's Office of Economic Development and the San Francisco Center for Economic Development.
2. Develop policy framework to support customized training initiative
3. Develop policy framework to support fee-for-service plan
4. Co-sponsor workforce related brown bag lunches with agencies such as the SF Chamber of Commerce, Small Business Commission and other business groups
5. Consider the identification of employer related research items to recommend to Research and Evaluation Committee
6. Plan next year's employer's forum
7. Coordinate with One-Stop Committee to develop employer component of marketing strategy and facilitate the implementation of One-Stop based employer services
8. Determine how to maximize the benefits of the Solutions Map

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Cancellation Notice

Please note that the Employer Services Committee Meeting scheduled for Friday, November 22, 2002 is cancelled.

The next meeting is scheduled for Wednesday, December 18, 2002 from 9:00 A.M. to 11:00 A.M.

Please forward this notice to the appropriate person(s). Thank you.

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**NOTICE OF A PUBLIC MEETING
OF THE
EMPLOYER SERVICES COMMITTEE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

DOCUMENTS DEPT.

DEC 13 2002

SAN FRANCISCO
PUBLIC LIBRARY

Date: Wednesday, December 18, 2002
Time: 9:00 a.m. – 11:00 a.m.
Location: Auditorium Community College District Office 33 Gough Street San Francisco CA 94103

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

**KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)**

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at <http://www.sfgov.org/bdsupvrs/sunshine.htm>

OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.



If you require special accommodation due to a disability, please call Roberta Fazande at 415-923-4265 or TDD 800-735-2929 (CRS) at least 72 hours in advance.

Issued: Wednesday, December 11, 2002

**PROPOSED AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
WEDNESDAY, DECEMBER 18, 2002**

1. Adoption of the Agenda (*Action Item*)
2. Adoption of Minutes from the meeting held on October 30, 2002 (*Action Item*)**
3. Public Testimony of Agenda Items (Discussion Item)
4. Solutions Map – Policy Implications for Private Sector Services Inclusion (Discussion and Possible Action Item)*
5. Report on San Francisco Economy (Discussion Item)*
6. Customized Training Policy Recommendation (*Action Item*)*
7. Public Testimony on Non-Agenda Items (Discussion Item)
8. New Business (Discussion Item)
9. Adjournment (*Action Item*)

* Information enclosed.

** Information to be sent.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE
MEMBERS

DATE: DECEMBER 11, 2002

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF *LH for PSC*

SUBJECT: POLICY IMPLICATIONS REGARDING THE INCLUSION OF PRIVATE
SECTOR SERVICES ON THE SOLUTIONS MAP (AGENDA ITEM 4)

BACKGROUND

At the October 23rd Employer Services Committee meeting, the Committee had a preliminary discussion on strategies to maximize the benefits of the Solutions Map. Members agreed that, at minimum, the Solutions Map should be made available on the Internet. Staff is currently implementing the process of updating and revising the Solutions Map to increase its usefulness. This process involves creating linkages between the Solutions Map's homepage to each provider's web site, developing links to each service's detailed description, and processing addition or deletion of current services profiled on the Map.

Based on feedback received on the Solutions Map, staff raised the issue of inclusion of private sector services. The Committee asked staff to develop policy implications related to such. The policy implications are outlined below with three major components: (1) use public funds to promote public service providers only, (2) use public funds to promote private and public sector service providers, and (3) charge private providers a fee to profile services on the Map.

POLICY IMPLICATIONS

(1) Publish Public Service Providers Only

- a) Limits customer's choice
- b) Service gap may exist
- c) Limits the opportunity to charge publishing fee for private sector providers

(2) Use Public Funds to Promote Private and Public Service Providers

In an attempt to determine the number of private workforce providers in San Francisco and its vicinity, staff aggregated the data by using the San Francisco Yellow Pages directory. One thousand two hundred and eight Yellow Pages listings of workforce development related firms were found in the categories classified below:

Categories

Advertising Personnel Recruitment
Business Consultants
Business and Economic Development
Computer Training

Listings

5
176
15
56

Employee Assistance Program	1
Employee Benefits & Compensation	19
Employee Leasing	9
Employment Agencies	275
Employment Opportunities	7
Employment Service – (Govt., Company, Fraternal)	4
Employment (Technical)	44
Employment (Temporary)	138
Executive Search	155
Hiring	0
Human factors	10
Human Resources	0
Management Consultants	155
Management Training	11
Outplacement	12
Outsourcing	0
Personal consultants	29
Recruiters	0
Tax Consultants	37
Temporary	0
Training (Program design and development)	50
Total:	1,208

It is evident that the number of private workforce services in the San Francisco area is extensive. By publishing private sector services using public funds, the following consequences may result:

- a) Use of public funds to develop the publication
- b) Need to make decision on which providers will be selected to profile, as funds are limited.
- c) Implies endorsement of the private sector services listed
- d) Difficult to verify accuracy of so many listings
- e) Duplicates and will not replace the Yellow Pages as reference of choice
- f) Intensifies competition between the public sector and the private sector
- g) Promotes customer's choice

(3) Charge private providers a fee for the publication

If a charge is required for private service providers to profile services on the Solutions Map, the following may result:

- a) Requires WISF to consider fee-for-service policy framework
- b) Generates fee-for-service revenue for the public workforce system
- c) Creates opportunity for private sector recognition of and involvement in the public workforce network
- d) Items 2 a, b, and c above are resolved
- e) Promotes customer choice

Staff will be available at your December 18th meeting to answer any questions you may have. Should you have any questions prior to the meeting, please contact Robert Schwab at 415-431-8700.

Research Brief: 10 Things to Know About San Francisco's Economy and Employers

A publication to inform San Francisco's workforce and
economic development community

DRAFT: December 10, 2002

Workforce Investment San Francisco Board

NOTE: The aim of this Research Brief is to provide members of San Francisco's workforce and economic development community with a basic orientation to the size, nature, structure, and historical evolution of San Francisco's economy in one easy-to-read document. This basic orientation will serve as a benchmark for future analysis into how San Francisco's economy is likely to change in the future. Your comments and feedback on this draft version are very welcome. Please direct them to Kevin Stange at 415-557-6569 or kevin_stange@ci.sf.ca.us.

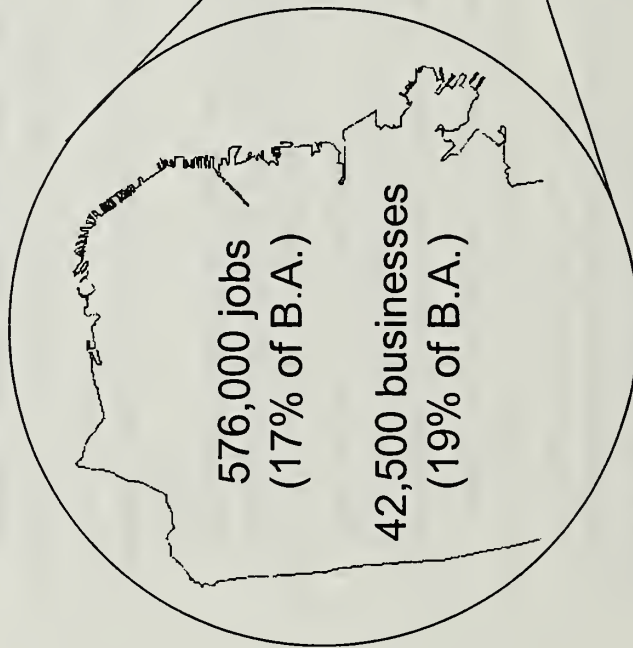
10 Things to Know About San Francisco's Economy and Employers

1. With approximately 600,000 jobs and 40,000 businesses, the City and County of San Francisco is an important component of the Bay Area regional economy.
2. San Francisco is highly integrated with this regional economy – nearly half of its workforce commutes in from surrounding communities while 20% of its employed residents work outside the city.
3. Over the last 30 years, San Francisco's employment has typically been slower growing than surrounding Bay Area counties, even during the boom of the late 1990's. The maturity of the city's economic base or and its constrained physical space likely explain this slow growth.
4. The city's economy is particularly dependent on its major export industry clusters: the Tourism, Corporate Deal-Making, Communications/Media, and Government Administration clusters. Export industries bring income to the city's residents and businesses from the outside, enabling spending on resident-consumed goods and services and fueling local employment growth.
5. The city's economy is diversified across many industries, but is particularly concentrated in industries which comprise its export clusters.
6. The city's industrial structure has shifted considerably over the last 30 years with the exceptional growth of the city's Service industry. Government and Finance employment has been stable for quite a while, while Trade has grown steadily with the overall economy. Transport, Communications, Utilities, and Construction have recently rebounded, while Manufacturing continues to decline.
7. The city's occupational structure is somewhat bifurcated, with many high-wage professional/technical and low-wage service jobs, but relatively fewer moderately-paid blue-collar jobs compared to the rest of the Bay Area.
8. While most San Francisco businesses are small, large companies account for a greater share of employment. The typical San Francisco worker is part of a 100 to 250-person firm.
9. The city's largest employers span a wide range of industries. Government organizations such as the City and County, UCSF and SFUSD and Fortune 500 headquarters such as Charles Schwab, Wells Fargo, PG&E, and Pacific Bell all employ a significant number of San Francisco workers.
10. Spatially, employment is concentrated in the office-heavy northeast districts of the city. Other districts have relatively less economic activity and employment is more concentrated in resident-serving retail and cultural/educational/health organizations. Most industrial activity is concentrated in the city's eastern neighborhoods.

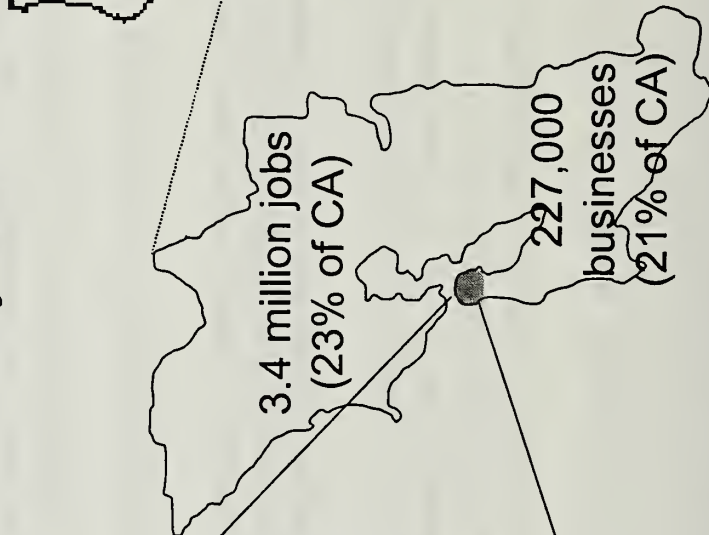
With approximately 600,000 jobs and 40,000 businesses, San Francisco is an important component of the Bay Area regional economy.

Employment* and Number of Businesses 3rd Quarter, 2001

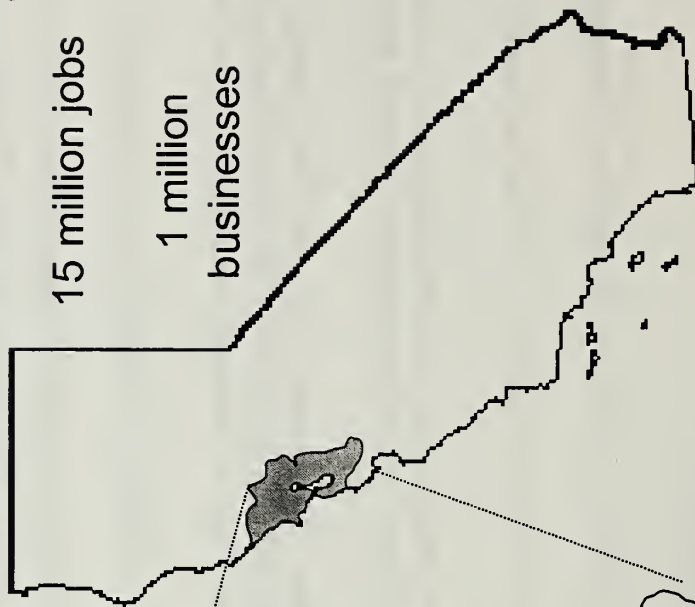
City and County of San Francisco



9-County Bay Area**



California



* Excludes the following types of workers:.....

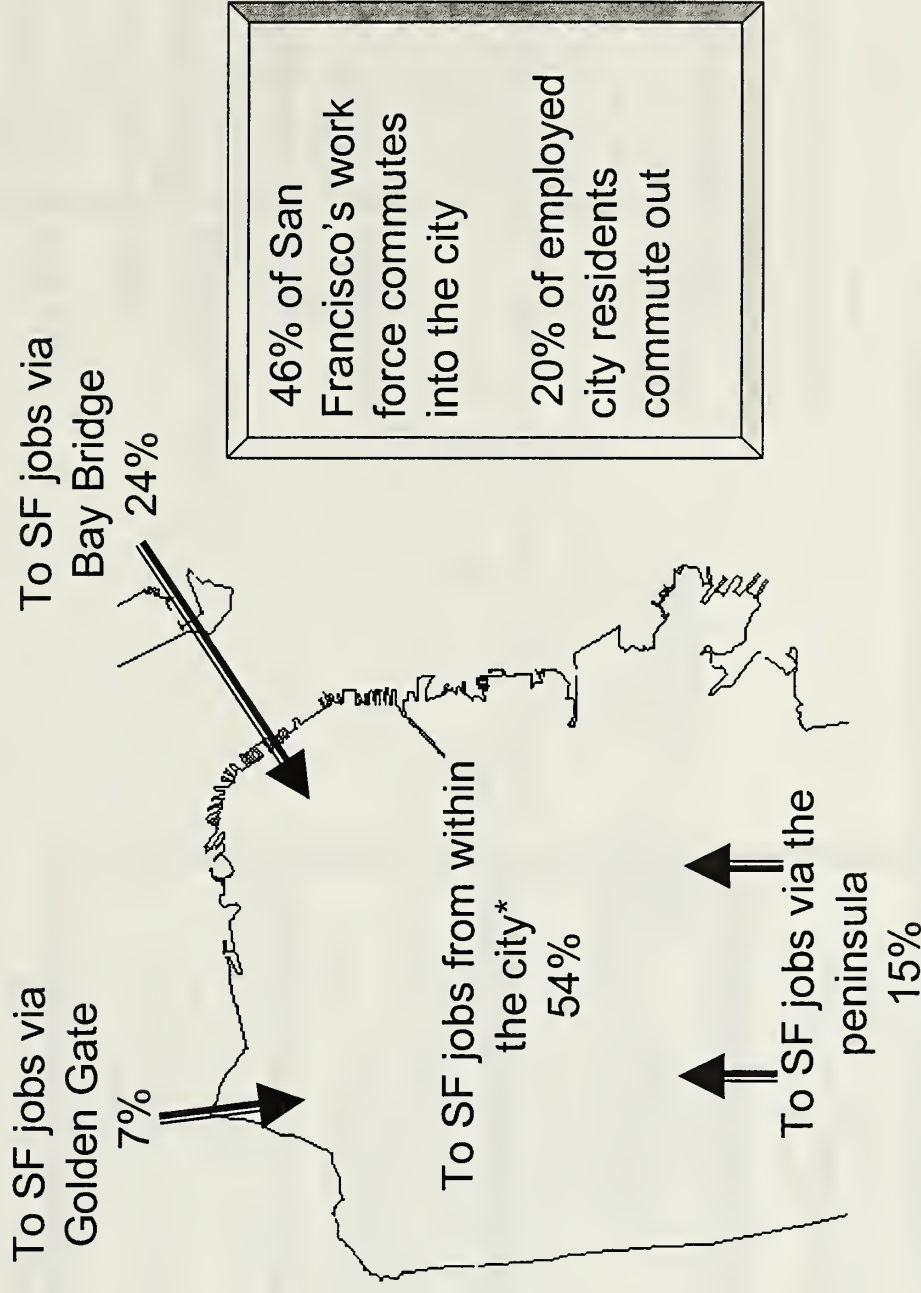
** Includes Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma counties

SOURCE: California Employment Development Department, Size of Business report

San Francisco is highly integrated with this regional economy – nearly half of the city's workforce commutes in from surrounding communities, while 20% of its employed residents work outside the city.

Commuters to San Francisco Jobs

% of total jobs in San Francisco County, 2000 projection



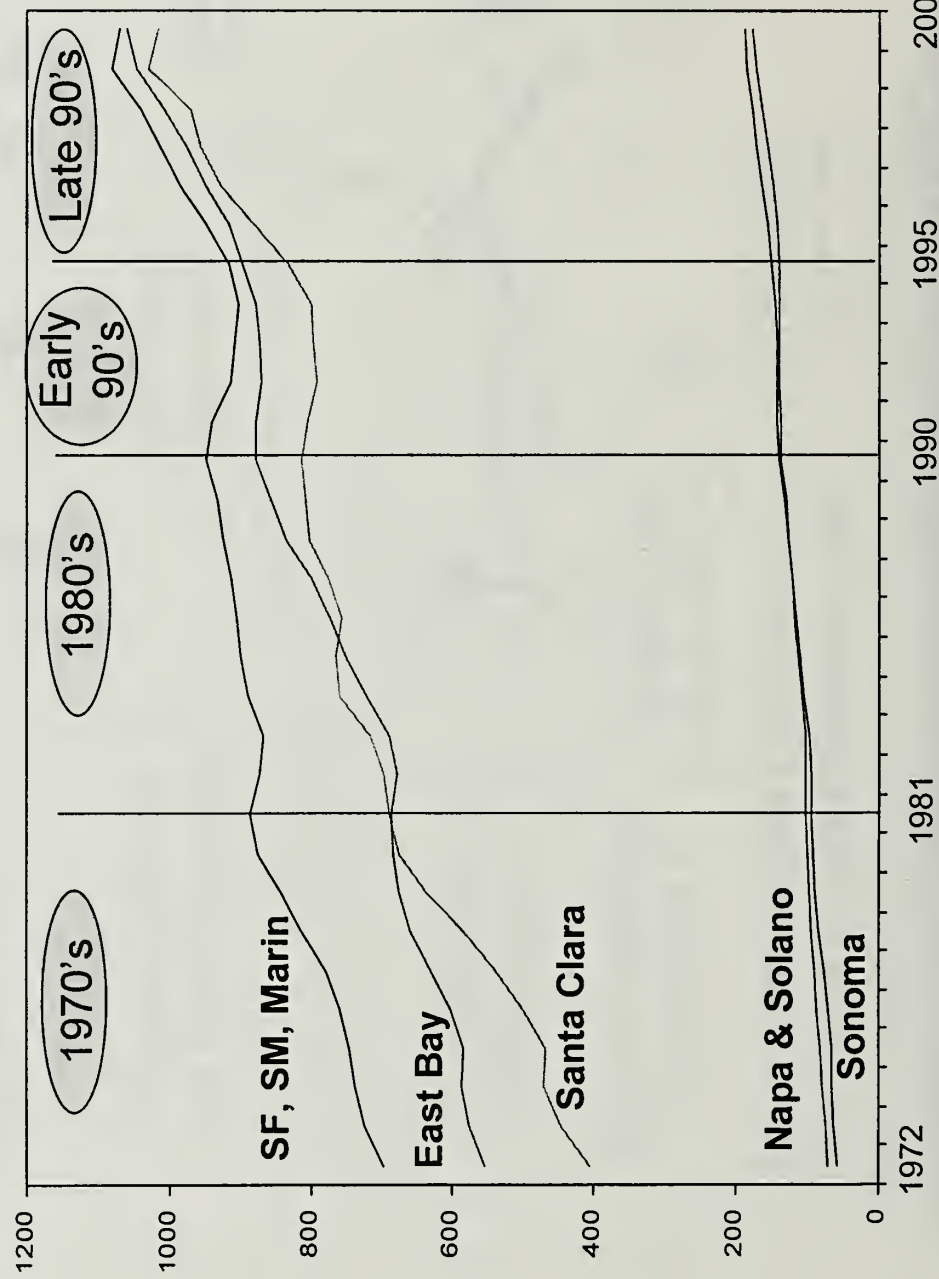
* An estimated 20% of all employed city residents commute to jobs outside San Francisco. These individuals are not included in this analysis.

SOURCE: Sims' (2000) analysis of commute and employment data based on 1998 projections from the Association of Bay Area Governments and the Metropolitan Transportation Commission.

Over the last 30 years, San Francisco's employment has typically been slower growing than surrounding Bay Area counties, even during the boom of the late 1990's. The maturity of the city's economic base or and its constrained physical space likely explain this slow growth.

Average Annual Employment*

1972-2001, thousands

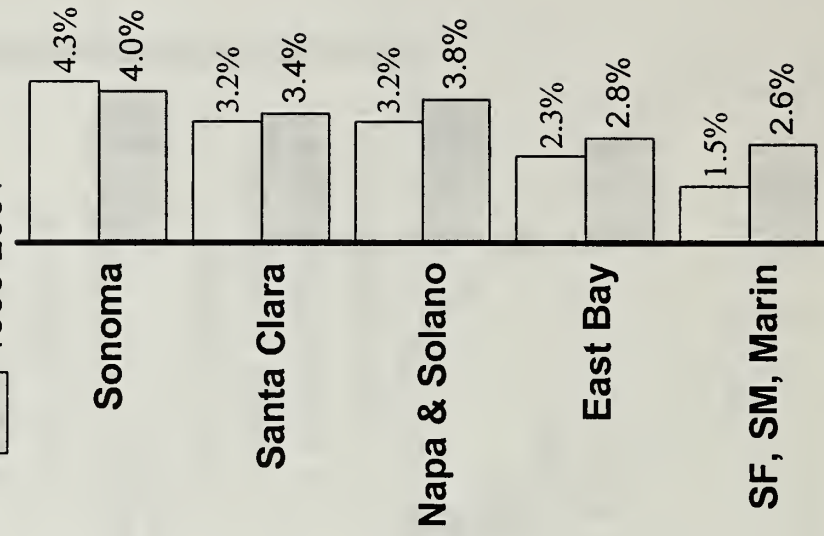


Employment Growth

Annual growth rate

1972-2001

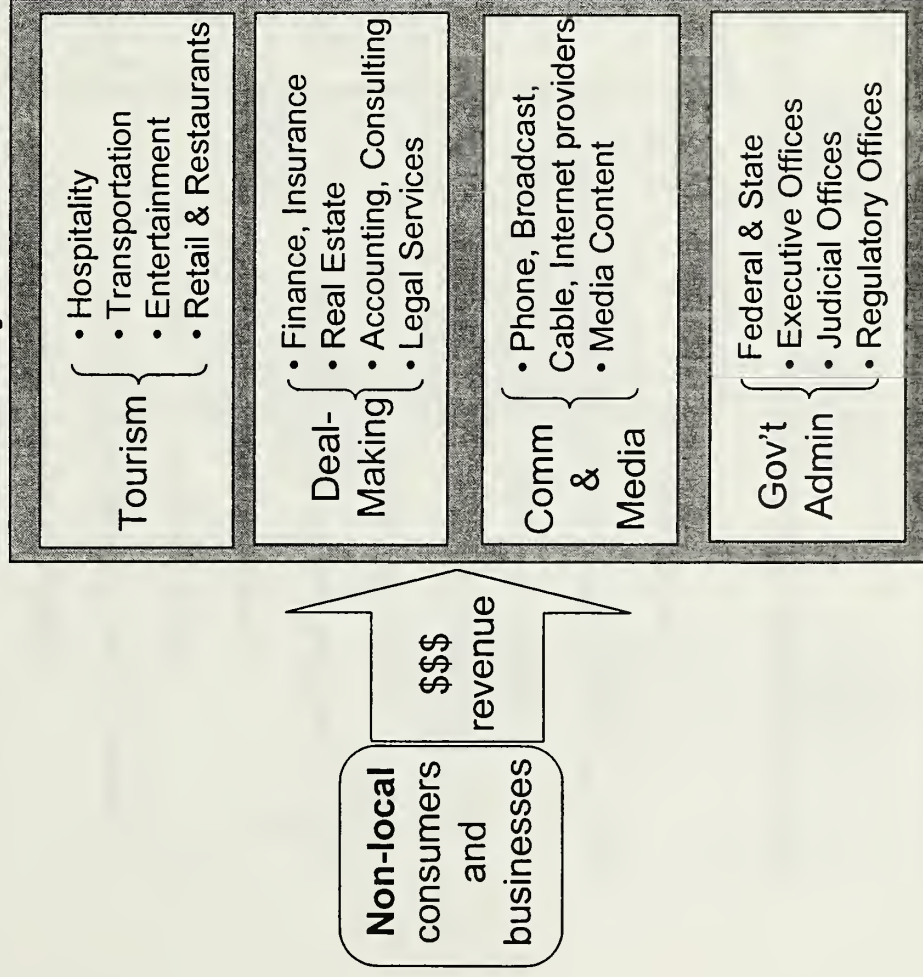
1995-2001



*Jobs are classified by place of work, regardless of where the employee lives. Does not include agricultural workers, the self employed, unpaid family workers, and private household employees. Multiple job holders may be counted twice.
SOURCE: BLS Current Employment Statistics program

The city's economy is particularly dependent on its major export industry clusters: the Tourism, Corporate Deal-Making, Communications/Media, and Government Administration clusters. Export industries bring income to the city's residents and businesses from the outside, enabling spending on resident-consumed goods and services and fueling local employment growth.


San Francisco's Export Industry Clusters*



* Many industries, retail for example, sell goods or services to both residents and non-residents and thus are both export and resident-serving industries.

SOURCE: Sims, Kent 2000. "San Francisco Economy – Implications for Public Policy," SPUR.

The city's economy is diversified across many industries, but is particularly concentrated in industries which comprise its export clusters.

 Higher share of employment vs B.A. and U.S.

Share of Total Employment, Annual Average, 2001



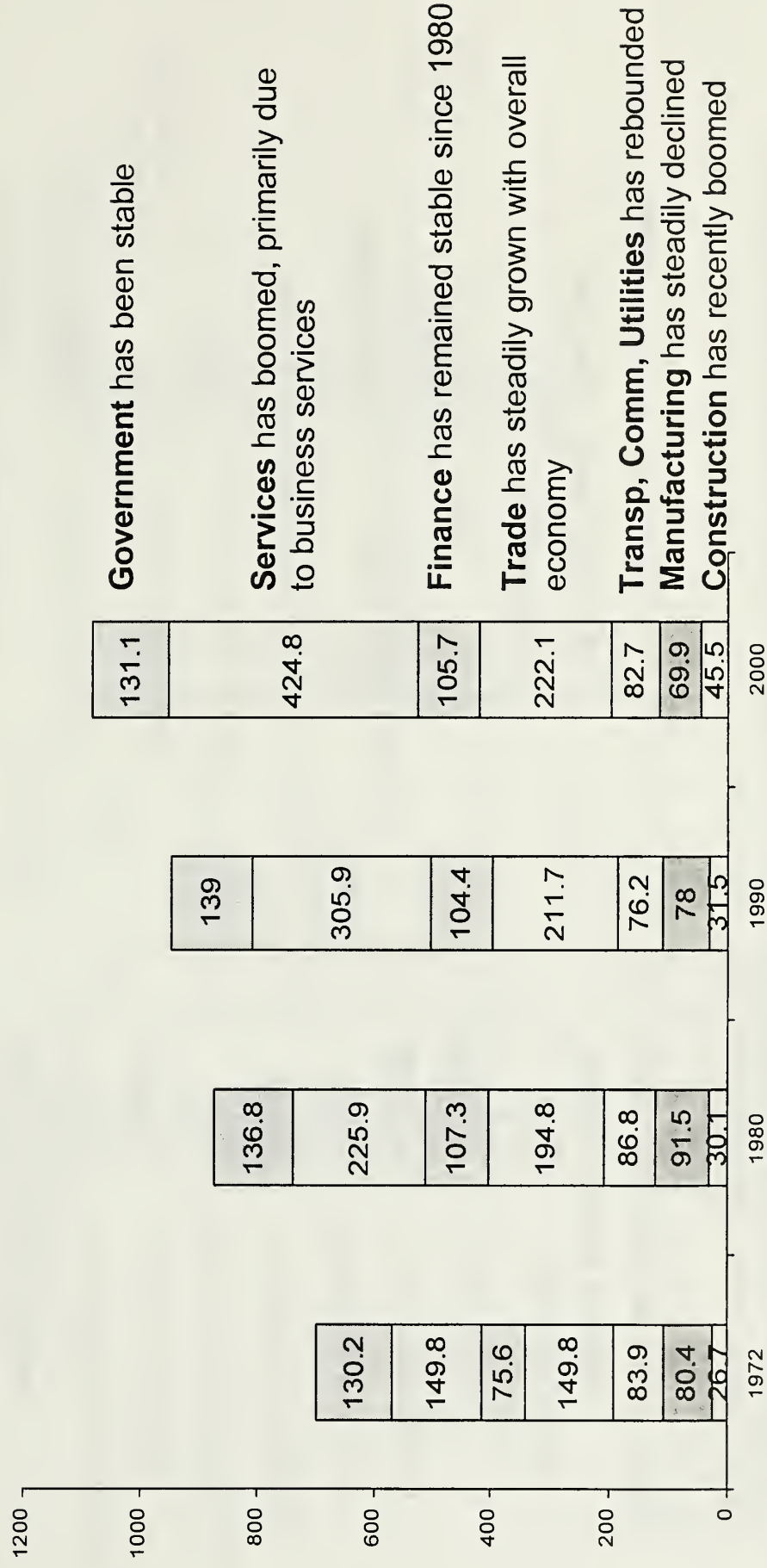
* Smaller categories include social services, amusement services, auto repair, motion pictures, personal services, legal services, museums, membership organizations, and agricultural services

SOURCE: California Employment Development Department, US Bureau of Labor Statistics Current Employment Survey

The city's industrial structure has shifted considerably over the last 30 years with the exceptional growth of the city's Service industry. Government and Finance employment has been stable for quite a while, while Trade has grown steadily with the overall economy. Transport, Communications, Utilities, and Construction have recently rebounded, while Manufacturing continues to decline.

Average Annual Employment*

San Francisco, San Mateo, Marin Counties, thousands



*Does not include agricultural workers, the self employed, unpaid family workers, and private household employees. Multiple job holders may be counted twice.

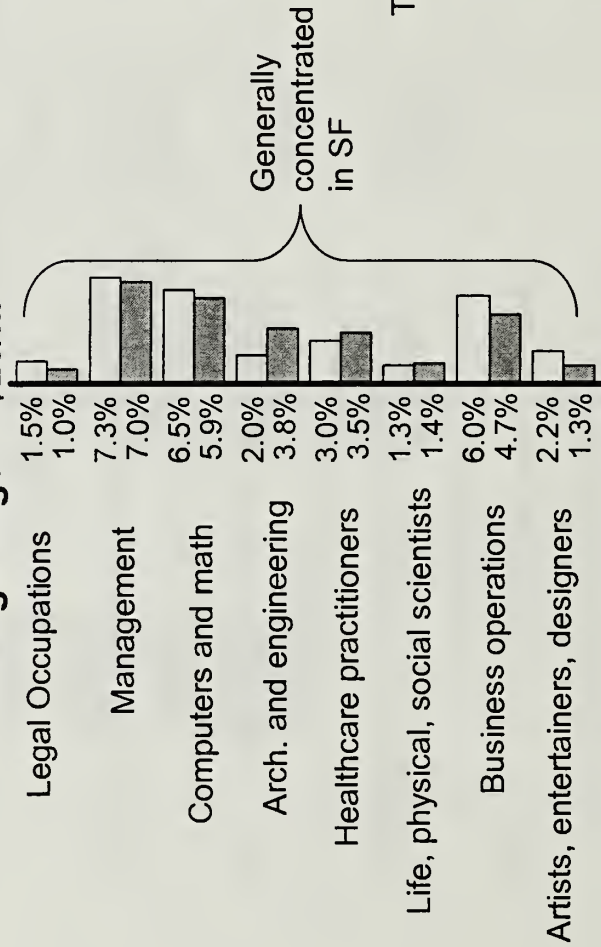
SOURCE: BLS Current Employment Statistics program

The city's occupational structure is somewhat bifurcated, with many high-wage professional/technical and low-wage service jobs, but relatively fewer moderately-paid blue-collar jobs compared to the rest of the Bay Area.

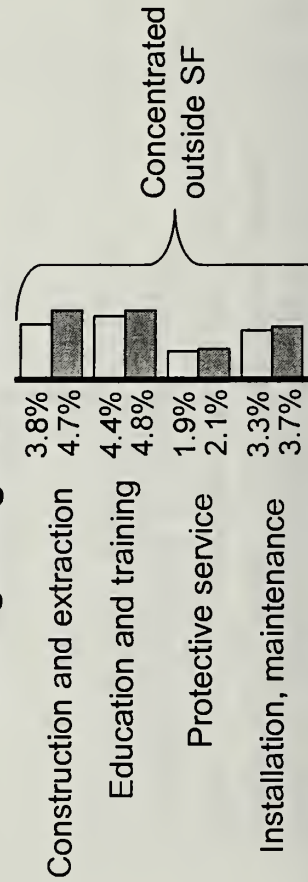
Share of Total Employment, 2000

□ SF, Marin, San Mateo* ■ Bay Area

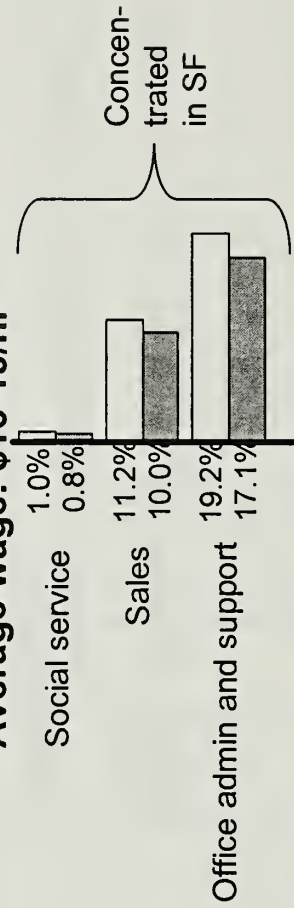
Average wage: > \$25/hr



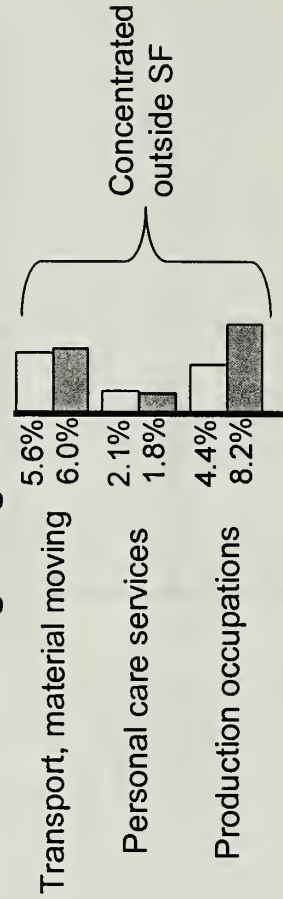
Average wage: \$19-25/hr



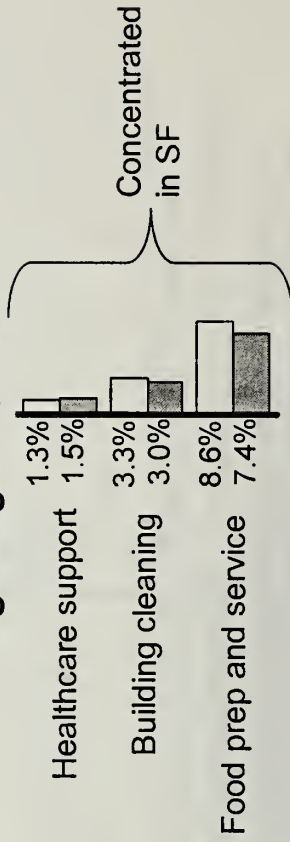
Average wage: \$16-19/hr



Average wage: \$13-15/hr



Average wage: < \$13/hr



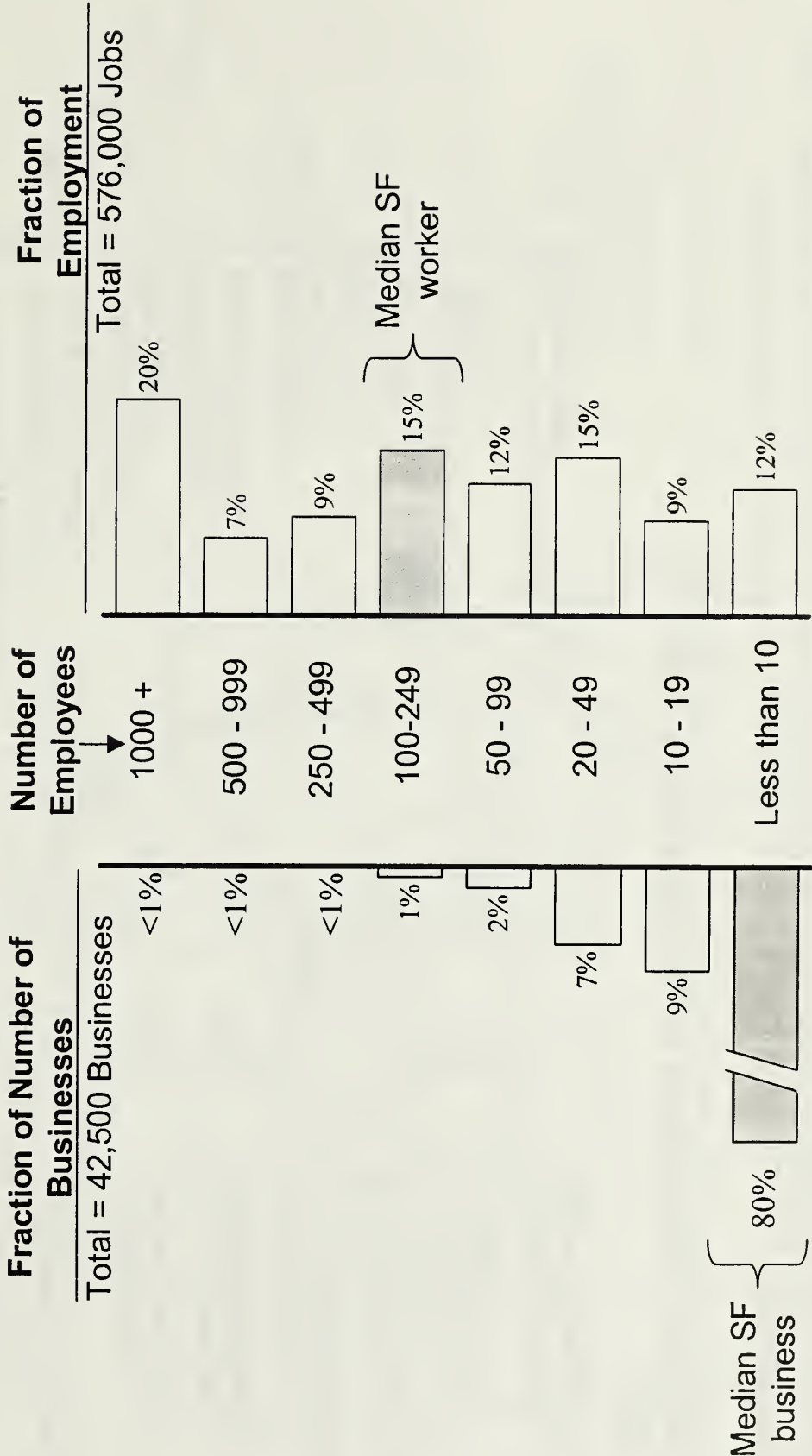
*Occupation data not available at county level

Note: Broad occupational categories are listed in descending order by average wage.

SOURCE: US Bureau of Labor Statistics Occupational Employment Statistics Survey

While most San Francisco businesses are very small, large companies account for a greater share of employment. The typical San Francisco worker is part of a 100 to 250-person firm.

Fraction of Businesses and Employment* by Size of Business San Francisco County, 3rd Quarter, 2001



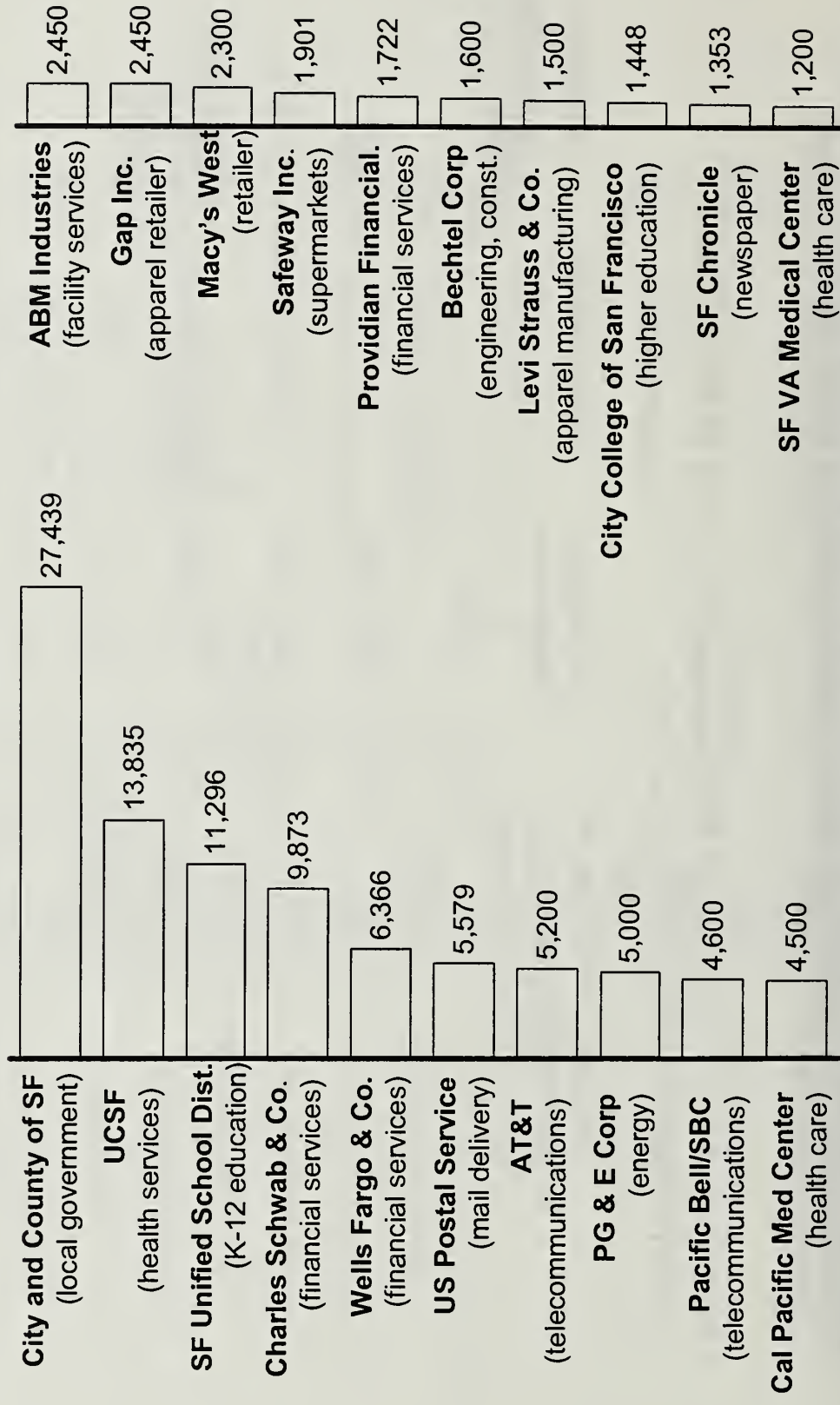
* Excludes the following types of workers:.....

SOURCE: California Employment Development Department, Size of Business report

The city's largest employers span a wide range of industries. Government organizations such as the City and County, UCSF and SFUSD and Fortune 500 headquarters such as Charles Schwab, Wells Fargo, PG&E, and Pacific Bell all employ a significant number of San Francisco workers.

Number of Employees in San Francisco County*

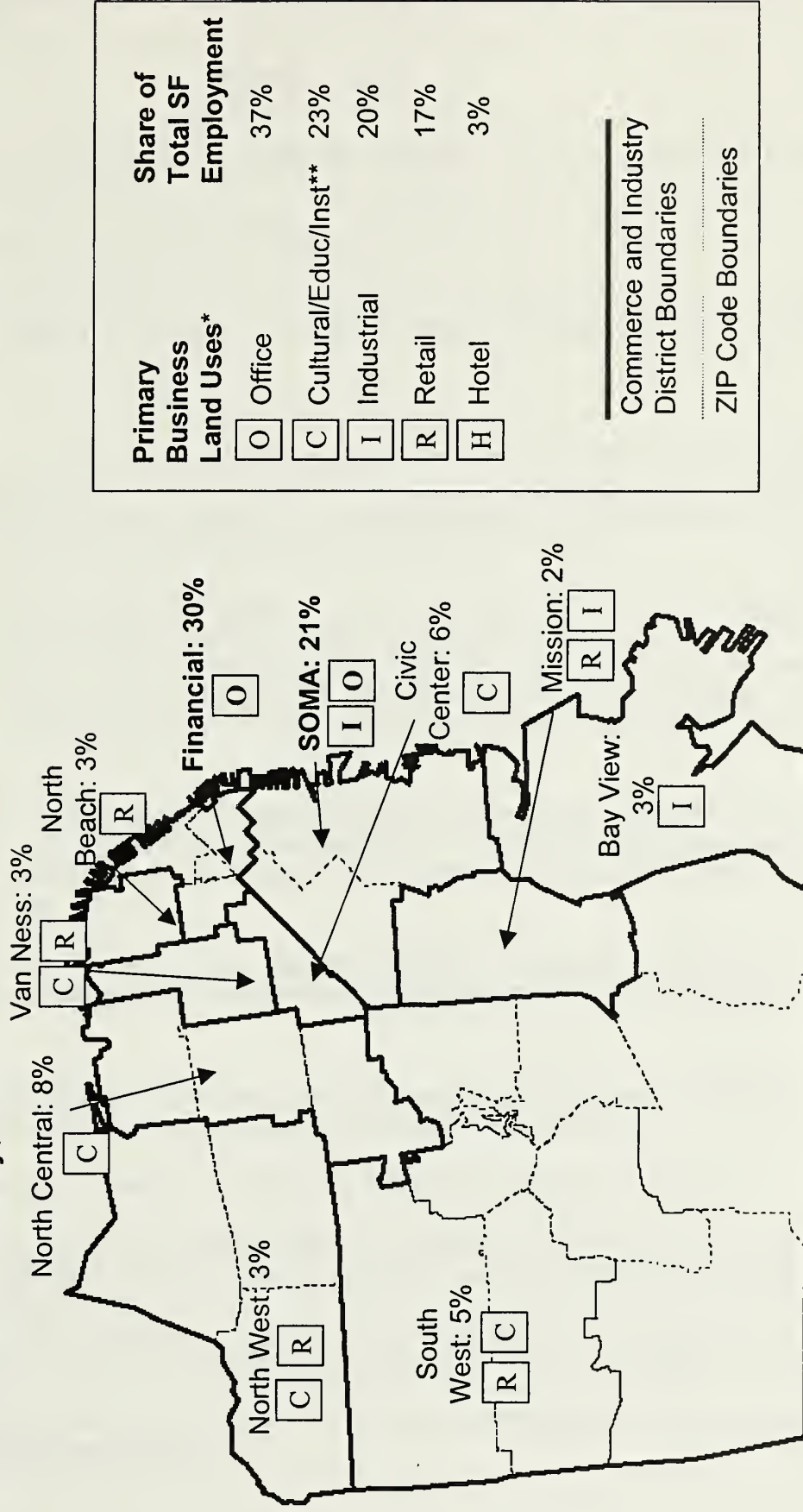
2000



* The US Federal Government, the State of California, Kaiser Foundation, Bank of America, St. Luke's Hospital, and the Federal Reserve Bank were not included in analysis, but are also major San Francisco employers.

Spatially, employment is concentrated in the office-heavy northeast districts of the city. Other districts have relatively less economic activity and employment is more concentrated in resident-serving retail and cultural/educational/health organizations. Most industrial activity is concentrated in the city's eastern neighborhoods.

Fraction of San Francisco Employment by Business District and Land Use San Francisco County, 2000



* Business land uses representing at least one quarter of a district's employment are identified on the map

** Includes schools, hospitals, clinics, social service facilities, museums, movie theaters, and other recreational facilities
SOURCE: San Francisco Planning Department, "Commerce and Industry Inventory 2001"

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE MEMBERS DATE: DECEMBER 11, 2002

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF *HA for PSU*

SUBJECT: RECOMMENDATION REGARDING CUSTOMIZED TRAINING (AGENDA ITEM 6)

BACKGROUND

Customized Training is defined in the Workforce Investment Act as training that is designed to meet the special requirements of an employer or group of employers. Also, Customized Training may be provided for both unemployed persons seeking employment and employed persons hoping to improve their skills and advance toward self-sufficiency.

Customized Training may be directly provided by the employer in the form of On-the-Job Training or by a third party training provider either at the work site, training provider site, or other location in the community. While customized training is expected to meet the special needs of employers, it may involve technology training, production or service procedure training, upgrading of skills, workplace literacy or other appropriate purposes identified by the Local Board.

If WIA funds are used for Customized Training, special conditions exist for both the employer and trainee. Employers must pay for at least one-half of the cost of the training and agree to hire or retain the trainee. Different eligibility criteria apply to trainees depending on whether they are employed or unemployed.

This memo is intended to inform your discussion through an outline on various policy implications and options regarding the implementation of a Customized Training Program.

HISTORY

At the April 25, 2002 Employer Services Committee meeting, committee members had a preliminary discussion on the concept of a local Customized Training Program.

At the end of the discussion, committee members arrived at the following consensus:

- (A) Ask Program Resource Committee's (PRC) consideration to set aside a defined portion of the WIA funds for a rapid turnaround system for customized training with criteria to be developed by staff.
- (B) Ask the Executive Committee to address the issue of "sole source" immediately. (See attached PIC and DOL correspondence related to the procurement of training providers.)
- (C) Ask the Program Resource Committee to examine all possible funding sources to fund Customized Training Programs.

BENEFITS OF CUSTOMIZED TRAINING

- 1) Leverages private funds
- 2) Serves employers as customer
- 3) Assists participants to attain self-sufficiency, which fulfills Mayor's challenge to the Board
- 4) Links to economic development to create new jobs in San Francisco, and assist in business attraction and retention
- 5) When Customized Training is used as Incumbent Worker Training, it creates new entry-level positions, as existing entry-level workers will advance to higher-level positions upon completion of training
- 6) Addresses gap (relative lack of employer provided training for entry-level jobs compared to higher skilled occupations) as identified in Employer Provided Training study by Kevin Stange
- 7) New sources of revenue for training providers
- 8) Builds employer awareness of other one-stop services
- 9) Builds employer services component of the one-stop
- 10) Provides fee-for-service revenue opportunity
- 11) Provides opportunity for employer and industry driven curriculum development

A 1998-1999 study by Isbell, Trutko, and Barnow on Customized Training cited the following advantages:

- a. A high percentage of trainees complete training, in part because they are motivated by the possibility of jobs at the end of the training.
- b. Almost everyone who successfully completes the training obtains full-time work in jobs paying at or above the JTPA wage.
- c. With appropriate training and other support services available through the JTPA program, retention rates for those entering training are high.
- d. Training enhances the trainee's skills and long-term employability both at the firm that sponsored the training and with other firms.
- e. Jobs are generally guaranteed if the trainee successfully completes training.

The jobs are generally full-time, paying at least the average JTPA wage, and often include fringe benefits and career advancement potential.

DISADVANTAGES OF CUSTOMIZED TRAINING

- 1) May diverted limited resources from very low-income households to the employed but not yet self-sufficient.
- 2) Shift portion of burden of training cost for incumbent workers from employer to public system.
- 3) Training may be so customized as to limit transferability of skills
- 4) Small firms may lack sufficient number of trainees to effectively participate in the program.
- 5) If training time is unpaid by employer, some low-income workers may not be able to participate.
- 6) Some firms are wary of partnership with government-funded programs, especially if there are time delays and extensive paperwork.

WIA RULES AND REGULATIONS

Customized training is defined under Section 101 (8) of the Workforce Investment Act (WIA) as follows:

- (A) Training that is designed to meet the special requirements of an employer (including a group of employers);
- (B) Training that is conducted with a commitment by the employer to employ or continue to employ an individual on successful completion of the training; and
- (C) Training for which the employer pays for not less than 50% of the cost of the training

In addition to the definition, customized training shall be conducted in accordance to the following WIA Rules and Regulations (29 CFR 663.230 and 663.720):

- (A) Customized training must relate to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy, or other appropriate purposes identified by the Local Board.
- (B) Individual participants must be WIA eligible and enrolled, and if employed, have earnings that are less than self-sufficient as defined by the local workforce investment area.

RECOMMENDATION

Adopt the Draft Policy for Customized Training outlined below and direct staff to undertake the development of procedures and resources necessary to implement a Rapid Turnaround Customized Training Program effective July 1, 2003.

Attachment

Customized Training Draft Policy – December 18, 2002

Draft Policy	Staff's Comments	Committee & Public's Comments
(1) Employer must hire or <i>advance</i> (see staff's comment) trainee upon completion of training. (WIA Sec.101(8); Final Rule 663.715(b))	Advance trainee upon completion of training is a Local Policy.	
(2) Employer must pay for at least 50% of the training cost plus a 10% administrative fee. (WIA Sec 101(8); Final Rule 663.715 (b))		
(3) Customized training shall be available only to local businesses. (Local Policy)		
(4) Customized training shall be related to high demand occupations identified by the Local Board. ("Linked to the Employment Opportunities in the Local Area..." WIA Sec 134 (4)(A) (iii))	Industry clusters may be targeted	
(5) Customized training shall be conducted only in occupations that provide opportunity for advancement and self-sufficiency. (WIA Final Rule 663.230)	Self sufficiency wage is determined by Local Policy criteria for employment leading to self-sufficiency eg. % of self sufficiency wage, document career ladder, benefits and permanent jobs	
(6) Customized training shall target low-skilled workforce as identified by Local Board.	Low skilled workforce is determined by wage level, basic skill deficient, language barrier, lacks High School diploma, less than 1 year work experience	
(7) In cases of limited funds, customized training priority shall be given to local businesses in economically distressed area	Businesses located in the State Enterprise Zone, or the Federal Renewal Community.	

Draft Policy	Staff's Comments	Committee & Public's Comments
(8) Customized training shall be a component of at least one One-Stop center. (Local Policy)		
(9) Training providers shall be identified through an open process. Once Local Board identifies the "high demand occupations", staff shall establish a list of selection criteria to be included in the solicitation. Priority shall be given to local trainers. (Local Policy)		
(10) For employed workers, customized training is limited to individuals not earning a self-sufficient wage as determined by WISF Board (Final Rule 663.720 (A))	A self-sufficiency standard adjusted for family size will need to be adopted the WISF Board.	
(11) Customized Training resources shall be aligned, where possible and appropriate, with economic development initiatives. (Local Policy)	Intended to attract new jobs to San Francisco	
(12) Each customized training project shall be monitored and evaluated for performance and continuous improvement purposes. (Local Policy)	Customer satisfaction, completion rate, trainees' attendance records, number of trainees passed competency tests administered by companies, retention rate, and wage after training	
(13) In instances where the employer pays 100% of the training costs, policy (4) and (6) is waived. (Local Policy)		

Draft Policy	Staff's Comments	Committee & Public's Comments
(14) Customized training trainee must be committed to advance to higher skilled job after completion of training. (Local Policy)		
(15) Trainee shall be committed to stay with the company for at least one year after completion of training. (Local Policy)		
(16) Customized training shall be promoted and coordinated through the one-stops, training providers, and partner agencies of the WISF network. (Local Policy)		
(17) Funds used for Customized Training shall be prioritized in the following order: (1) Private funds, (2) Employment and Training Panel (ETP) fund, (3) Pell Grant and (4) WIA (Local Policy)		

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**DRAFT MINUTES OF THE
JANUARY 15, 2003 MEETING OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

MAR 20 2003

SAN FRANCISCO
PUBLIC LIBRARY

The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

William Allen, Steve Arcelona, Kathy Citron, Theresa Feeley, Nathan Nayman, John Poremba, and Ave Seltsam

ABSENT:

Irene Agnos, Corliss Fong, Scott Hauge, and Stan Warren

STAFF:

Alice Chiu, Asper Choup, Cathy deCristofaro, Wes Dixon, Lucia Hughes, Emma Perez, and Robert Schwab

PUBLIC:

Larry Brayman, Betty Broussard, Cynthia Buitrago, Louis Dunn, Devra Edelman, Robert Hector, Julie Kim, Patrick Klune, Ted Koch, Cheemeny Lee, Bernard Leung, Mark Mak, Rhody McCoy, Shawishi Monroe, Stephen Poulin, Patricia Peretz, Mario Quevedo, Linda Rosel, Kevin Stange, Diane Wagner, and Les Wong

The meeting was convened at 3:10 P.M. with a quorum established.

Motion to adopt agenda was made by Theresa Feeley, and seconded by Kathy Citron.

Ayes: William Allen, Steve Arcelona, Kathy Citron, Theresa Feeley, John Poremba, and Ave Seltsam

Nays: None

Abstentions: None

Motion passed.

Motion to adopt minutes from the December 18, 2002 meeting was made by William Allen, and seconded by John Poremba.

Ayes: William Allen, Steve Arcelona, Kathy Citron, Theresa Feeley, John Poremba, and Ave Seltsam

Nays: None

Abstentions: None

Motion passed.

Chair Nayman asked that public testimony be taken at the time of the agenda items.

Item 4 – Customized Training Policy Recommendations

Robert Schwab presented the revised policy recommendations for the customized training program. The Committee was asked to adopt the set aside amount of 15% of WIA Adult Fund for the rapid turnaround customized training program and to adopt the revised policy recommendations. He noted that the revised policy changes were made at the last Committee meeting and the WIA allocation had not been announced.

Chair Nayman commented that the percentage set aside may not be sufficient to fund the program since the WIA Adult allocation is unknown. He suggested that a specific dollar amount be recommended.

Steve Arcelona suggested looking into various funding sources, not just from WIA Adult, to fund the program.

Kathye Citron suggested at least \$300,000 (from different sources) be set aside.

In regards to item #17 of the Draft Customized Training Policy Framework, Kathye Citron suggested using the language "reasonable".

In regards to item #1 of the Draft Customized Training Policy Framework, Theresa Feeley suggested using "pre-employment" in place of "OJT" to broaden the category.

Motion to direct the Finance subcommittee to set aside not less than \$300,000 for the rapid turnaround customized training in program year 2003-04 was made by Nathan Nayman and seconded by Kathye Citron.

Ayes: William Allen, Steve Arcelona, Kathye Citron, Theresa Feeley, John Poremba, and Ave Seltsam

Nays: None

Abstentions: None

Motion passed.

Motion to adopt the suggested language was made by Kathye Citron and seconded by Theresa Feeley.

Ayes: William Allen, Steve Arcelona, Kathye Citron, Theresa Feeley, John Poremba, and Ave Seltsam

Nays: None

Abstentions: None

Motion passed.

Motion to adopt the recommendations with the above amendments was made by Theresa Feeley and seconded by William Allen.

Ayes: William Allen, Steve Arcelona, Kathye Citron, Theresa Feeley, John Poremba, and Ave Seltsam

Nays: None

Abstentions: None

Motion passed.

Because of time constraint, Chair Nayman deferred items 5 and 6 to the next meeting's agenda.

The Committees adjourned at 4:00 P.M.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

EMPLOYER SERVICES COMMITTEE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

DOCUMENTS DEPT.

FEB 21 2003

SAN FRANCISCO
PUBLIC LIBRARY

Date: Wednesday, February 26, 2003

Time: 9:30 a.m. – 11:30 a.m.

Location: Auditorium
Community College District Office
33 Gough Street
San Francisco CA 94103

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

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Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at <http://www.sfgov.org/bdsupvrs/sunshine.htm>

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Issued: Wednesday, February 19, 2003

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TDD 800.735.2929 (CRS)

PROPOSED AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
Wednesday, February 26, 2003

1. Adoption of the Agenda (*Action Item*)
2. Public Testimony of Agenda Items (*Discussion Item*)
3. Report on Greg Newton's Training: Building Employer Relationships...Making Businesses Satisfied, Life-Long Partners and Customers (*Discussion Item*)
4. Revised Customized Training Policy Recommendation (*Action Item*)*
5. Solutions Map – Policy Implications for Private Sector Services Inclusion (*Discussion and Possible Action Item*)*
6. Public Testimony on Non-Agenda Items (*Discussion Item*)
7. New Business (*Discussion Item*)
8. Adjournment (*Action Item*)

* Information enclosed.

Customized Training Draft Policy – Final Revision January 15, 2003

Draft Policy	Committee & Public's Comments
<p>(1) Employer shall make a good faith effort to hire (for Pre-Employment Training) or <u>advance</u> (for existing employee) trainee upon successful completion of training. (WIA Sec.101(8); Final Rule 663.715(b)) <i>Employers and training providers may will define the term "successful" up-front, and may include the employer's measure of skill attainment.;</i> <i>Advancement may take the form of wage enhancement and/ or increase in job responsibilities for existing employees.</i></p>	
<p>(2) For pre-employment training contracts, employer must pay for at least 50% of the training cost plus a negotiated administrative fee where applicable. (WIA Sec 101(8); Final Rule 663.715) (b) <i>In cases where employers are unable to pay for at least 50% of the training cost, private funds, such as philanthropic dollars, may be used to substitute the employer's fee.</i> In-kind contribution to offset the employer's share may be allowed based on funding source requirement.</p>	
<p>(3) Customized training shall be available to San Francisco and SFO businesses. (Local Policy)</p>	
<p>(4) Customized training shall be related to <u>employment</u> opportunities or growth occupations identified by the Local Board. ("Linked to the Employment Opportunities in the Local Area..." WIA Sec 134 (4)(A) (iii)) <i>Jobs that provide the greatest opportunity for growth, and for the greatest likelihood of full-time continued employment shall be considered for this service.</i></p>	
<p>(5) Customized training shall be conducted only in occupations that provide opportunity for advancement <u>and</u> self-sufficiency. (WIA Final Rule 663.230)</p>	

Draft Policy	Committee & Public's Comments
<p>(6) For employed workers, customized training shall target low-skilled workforce as determined by wage level, basic skill deficient, language barrier, lacks High School Diploma, less than 1 year work experience, and other barriers to advancement. It shall also target high-skilled workers that are unemployed and need retraining, and the unemployed age 55 or over that are re-entering the workforce and need upgrade skills training. (Local Policy)</p>	
<p>(7) In cases of limited funds, customized training priority shall be given to local businesses in economically distressed areas, such as the Enterprise Zone or the Federal Renewal Community. "Limited funds" shall be defined by the WISF Board. Customized Training resources shall be aligned, where possible and appropriate, with economic development. As job quality is the absolute standard, priority shall be given to jobs with good job qualities, such as high retention rate, wage advancement opportunity, provide employees with greatest opportunity to become self-sufficient and sustain long-term growth within the company over the location of the businesses. (Local Policy)</p>	
<p>(8) Training providers shall be identified through a continuous and open process that to the greatest extent allows for rapid turnaround and employer's choice. <u>Employer will make the final selection of the training provider, consistent with this policy.</u> Once Local Board identifies the "high demand occupations", staff shall establish a list of selection criteria to be included in the solicitation. Priority shall be given to San Francisco trainers. (Local Policy) <i>Staff may need to conduct legal studies and report back to Committee with various scenarios as this draft policy may hinder other employer-friendly efforts listed in this draft, such as Rapid Turnaround, and employer's choice.</i></p>	

Draft Policy	Committee & Public's Comments
<p>(9) For employed workers, customized training is limited to individuals not earning a self-sufficient wage as determined by WISF Board. A self-sufficiency standard adjusted for family-size will need to be adopted by the WISF Board. (WIA Final rule 663.720)</p>	
<p>(10) Each customized training project shall be monitored and evaluated for performance and continuous improvement purposes. (Local Policy) Project will be evaluated on employers' and trainees' satisfaction, completion rate, trainees' passed competency tests administered by companies if appropriate, retention rate, and wage after training. Labor market needs and data on impact on employers' recruitment cost, retention, turnover and staffing pattern change, shall also be gathered. Staff shall report these data to the Board on a quarterly basis and a more comprehensive report to the Employer Services Committee on a quarterly basis.</p>	
<p>(11) In instances where the employer pays 100% of the training costs, policies (3), (4), and (6) are waived. (Local Policy)</p>	
<p>(12) Customized training trainees shall make a good faith effort to advance to higher skilled jobs after successful completion of training.</p>	
<p>(13) Customized training shall be accessible through the one-stops, or coordinated through training providers, or partner agencies of the WISF network. (Local Policy) <i>The program shall be designed using a multi-faceted approach on how the employers are engaged.</i></p>	
<p>(14) Funds used for Customized Training shall be prioritized in the following order: (1) Private funds, (2) Employment and Training Panel (ETP) funds, (3) Pell Grants, and (4) WIA funds (Local Policy) <i>To complement the Rapid Turnaround concept, WIA Adult Funds may need to be used up-front to pay for the training when reasonable and appropriate and be reimbursed by other eligible sources of funding, even though the trainee is eligible for other sources of funding.</i></p>	

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE MEMBERS **DATE:** FEBRUARY 19, 2003

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: POLICY IMPLICATIONS REGARDING THE INCLUSION OF PRIVATE SECTOR SERVICES ON THE SOLUTIONS MAP (Agenda Item 5)

BACKGROUND

At the October 23rd Employer Services Committee meeting, the Committee had a preliminary discussion on strategies to maximize the benefits of the Solutions Map. Members agreed that, at minimum, the Solutions Map should be made available on the Internet. Staff is currently implementing the process of updating and revising the Solutions Map to increase its usefulness. This process involves creating linkages between the Solutions Map's homepage to each provider's web site, developing links to each service's detailed description, and processing addition or deletion of current services profiled on the Map.

Based on feedback received on the Solutions Map, staff raised the issue of inclusion of private sector services. The Committee asked staff to develop policy implications related to such. The policy implications are outlined below with three major components: (1) use public funds to promote public service providers only, (2) use public funds to promote private and public sector service providers, and (3) charge private providers a fee to profile services on the Map.

POLICY IMPLICATIONS

(1) Publish Public Service Providers Only

- a) Limits customer's choice
- b) Service gap may exist
- c) Limits the opportunity to charge publishing fee for private sector providers

(2) Use Public Funds to Promote Private and Public Service Providers

In an attempt to determine the number of private workforce providers in San Francisco and its vicinity, staff aggregated the data by using the San Francisco Yellow Pages directory. More than 1200 Yellow Pages listings of workforce development related firms were found in the categories classified below:

<u>Categories</u>	<u>Listings</u>
Advertising Personnel Recruitment	5
Business Consultants	176
Business and Economic Development	15
Computer Training	56
Employee Assistance Program	1
Employee Benefits & Compensation	19
Employee Leasing	9
Employment Agencies	275
Employment Opportunities	7
Employment Service – (Govt., Company, Fraternal)	4
Employment (Technical)	44
Employment (Temporary)	138
Executive Search	155
Hiring	0
Human factors	10
Human Resources	0
Management Consultants	155
Management Training	11
Outplacement	12
Outsourcing	0
Personal consultants	29
Recruiters	0
Tax Consultants	37
Temporary	0
Training (Program design and development)	50
Total:	1,208

It is evident that the number of private workforce services in the San Francisco area is extensive. By publishing private sector services using public funds, the following consequences may result:

- a) Use of public funds to develop the publication
- b) Need to make decision on which providers will be selected to profile, as funds are limited.
- c) Implies endorsement of the private sector services listed
- d) Difficult to verify accuracy of so many listings
- e) Duplicates and will not replace the Yellow Pages as reference of choice
- f) Intensifies competition between the public sector and the private sector
- g) Promotes customer's choice

(3) Charge private providers a fee for the publication

If a charge is required for private service providers to profile services on the Solutions Map, the following may result:

- a) Requires WISF to consider fee-for-service policy framework
- b) Generates fee-for-service revenue for the public workforce system
- c) Creates opportunity for private sector recognition of and involvement in the public workforce network
- d) Items 2 a, b, and c above are resolved
- e) Promotes customer choice

OPTIONS FOR CONSIDERATION

- a) Include but not solicit private providers, but charge a listing fee and verify accuracy of those who come to us.
- b) Include public sector listings only
- c) Include and actively solicit both private and public providers

Staff will be available at your February 26, 2003 meeting to answer any questions you may have. Should you have any questions prior to the meeting, please contact Robert Schwab at 415-431-8700.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**DRAFT MINUTES OF THE
FEBRUARY 26, 2003 MEETING OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

DOCUMENTS DEPT

MAR 20 2003

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The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

William Allen, Theresa Feeley, and Nathan Nayman

ABSENT:

Steve Arcelona, Kathy Citron, Corliss Fong, John Poremba, Ave Seltsam, and Stan Warren

STAFF:

Alice Chiu, Cathy deCristofaro, Wes Dixon, Lucia Hughes, and Robert Schwab

PUBLIC:

Don Hesse, Julie Kim, Henry Lau, Mark Mak, Rhody McCoy, Missy Raglin, Bill Rosenberg, Nancy Rynd, Kevin Stange,

The meeting was convened at 9:30 P.M. A quorum was not established.

Chair Nayman asked that public testimony be taken at the time of the agenda items.

Item 3 – Customized Training Policy Recommendations

Lucia Hughes and Robert Schwab reported on the Greg Newton's training, "Building Employer Relationships...Making Businesses Satisfied, Life-long Partners, and Customers". Ms. Hughes shared that the common thread throughout the workshop was relationship building. According to Mr. Newton, to build successful relationships, services must be provided beyond placement to more comprehensive services (i.e. layoff assistance). This would encourage employers to look to the public workforce for future opportunities or references.

What do businesses want?

There are four key drivers of customer satisfaction that employers want: understanding their needs, being responsive, knowing their industries, and working as partners. Employers are looking for someone to listen, to be accountable, to become industry specialists, and to join in common endeavor.

Employers are interested in three types of training: on-the-job training (also known as OJT), customized training, and occupational training. OJT is training by the employer and the employer must make a commitment to hire the trainee upon successful completion of training. Customized training is provided by a third-party trainer, employer must be involved in training selection, employer must hire or advance trainee upon successful completion of training, and pay at least fifty percent of training cost. Occupational training is more classroom-based, provide certifications, and demand is on the decline.

Employers are also interested in "real" labor market data. In this regard, Ms. Hughes shared that Kevin Stange, WISF Research Analyst, and John Crapo of San Francisco Center of Economic Development are working to provide this to employers.

Employers want skills like personal life management, basic skills (i.e. communication, customer service, computer literacy), workplace behavior, occupational skills, and job skills. It has been demonstrated that there is greatest success when the above are offered in combination with one another.

Employers want the trainees to be screened. "Screening" means that the best applicants are sent, their skills and other information are verified, and background checks are performed.

Suggestions to achieve goals

An employer tracking system should be developed and shared among the business services representatives. In the system, transactions with employers are noted to track repetitive use and level of use) and collect employer contact information.

Performance measures should be established to hold the system accountable. The One Stop system must have program measures, center measures, and system measures. Program measures who and how many entered employment, retention rate, and who have increased income. Center measures number of individuals served. System measures market penetration, sector penetration and repetitive use.

Major Policy Questions

There are four major policy questions that the WISF Board need to answer: which business services model should be adopted, which industry targets should be targeted, what is the proper balance between employer-based training and classroom-based training, and what role should the Board play in San Francisco's economic development?

Next Steps

Mr. Schwab reported the next steps of the Committee and Board. A local vision for business services and an inventory of current services and relationships need to be developed. Once the inventory is done, territorial issues need to be resolved and establish trust within the system. A business services model need to be developed so that it is responsive to businesses, that maximizes resources, build on existing relationships, creates a system solution for businesses needs, and create the greatest opportunity for our other customers to mover towards self sufficiency. Targeted industry sectors need to be determined. Industry clusters need be developed across the partner organizations and a business services representative should be created to represent the employer to the system. The representative would listen to the employer's needs, report back to his/her industry cluster and pull together a customized service package, propose the package to the employer within three days and follow through. Marketing tools need to be developed to promote business services including customized training.

Discussion

William Allen agreed that working relationships between community organizations, employers, and the Board are important. He encouraged the next steps be taken as soon as possible.

Theresa Feeley agreed that turf issues needed to be resolved before employer data is shared and added that this should be done before marketing of the system. She emphasized the potential for "creaming", creating a system to bring an individual to the "best" skill level.

Chair Nayman pointed out that judgment should be made not on the individual but by the match of the employer's needs and the individual's job skills. Ms. Feeley added that the individual's positive attitude is an important factor.

Chair Nayman requested a presentation be made to the Small Business Commission. He added that an outreach program should be created to present the information to all commissions and associations.

Ms. Feeley added that resolved turf issues and system implementation needed to happen simultaneously. She suggested that this information also be presented to the Community of Community Agencies and hold a discussion of concerns and fears. The discussion should be reported back to the Committee.

William Allen expressed interest for Board members to be involved in the program monitoring visits. He commented that since the Board is responsible for program oversight, they should be part of the program reviews.

Chair Nayman asked that mid-year program reviews be emailed or faxed to the Committee.

In preparation of Kevin Stange's departure, Mr. Allen asked that a transition plan to drafted to include top five priorities in the research.

Item 4 – Customized Training Policy

Mr. Schwab presented further refinements to the customized training policy made by Greg Newton. In the first policy, "may" was replaced with "will" and added "may include the employer's measure of skill attainment" to read: "Employers and training providers will define the term 'successful' upfront, and may include the employer's measure of skill attainment." In the fourth policy, "employment opportunities or growth" was added to read: "Customized training shall be related to employment opportunities or growth occupations identified by the Local Board".

Item 5 – Solution Map

Mr. Schwab reported that the map is currently being "websized" or made interactive on the website.

Ms. Feeley expressed concerns of the exclusion of private sectors. She suggested that private sectors that are contracted through the individual referral program be included.

The Committees adjourned at 11:00 A.M.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

EMPLOYER SERVICES COMMITTEE (ESC)

DOCUMENTS DEPT.

MAR 20 2003

SAN FRANCISCO
PUBLIC LIBRARY

Date: Wednesday, March 26, 2003
Time: 9:30 a.m. – 11:30 a.m.
Location: Auditorium
Community College District Office
33 Gough Street
San Francisco, CA 94103

AGENDA APPEARS ON THE REVERSE SIDE

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE (Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at www.ci.sf.ca.us/infoctr/sunshine/index.htm

OTHER ACCOMMODATIONS

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Issued: Wednesday, March 19, 2003

**PROPOSED AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
WEDNESDAY, MARCH 26, 2003**

1. Adoption of the Agenda (*Action Item*)
2. Adoption of Youth Council Minutes from the Meetings Held on January 15, 2003 and February 26, 2003 (*Action Item*)*
3. Public Testimony Agenda Items (Discussion Item)
4. Revised Customized Training Policy Recommendation (*Action Item*)*
5. Program Performance Updates (Discussion Item)
6. Business On Board II (Discussion Item)
7. One-Stop Operations and Services Committee Report (Discussion Item)
8. Public Testimony on Non-Agenda Items (Discussion Item)
9. Future Agenda Items (Discussion Item)
10. Adjournment (*Action Item*)

* Information enclosed.

Draft Policy	Committee & Public's Comments
<p>(1) Employer shall make a good faith effort to hire (for Pre-Employment Training) or <u>advance</u> (for existing employee) trainee upon successful completion of training. (WIA Sec.101(8); Final Rule 663.715(b) <i>Employers and training providers may will define the term "successful" up-front, and may include the employer's measure of skill attainment. Advancement may take the form of wage enhancement and/ or increase in job responsibilities for existing employees.</i></p>	
<p>(2) For pre-employment training contracts, employer must pay for at least 50% of the training cost plus a negotiated administrative fee where applicable. (WIA Sec 101(8); Final Rule 663.715) (b) <i>In cases where employers are unable to pay for at least 50% of the training cost, private funds, such as philanthropic dollars, may be used to substitute the employer's fee.</i> In-kind contribution to offset the employer's share may be allowed based on funding source requirement.</p>	
<p>(3) Customized training shall be available to San Francisco and SFO businesses. (Local Policy)</p>	
<p>(4) Customized training shall be related to <u>employment</u> opportunities or growth occupations identified by the Local Board. ("Linked to the Employment Opportunities in the Local Area..." WIA Sec 134 (4)(A) (iii)) <i>Jobs that provide the greatest opportunity for growth, and /or the greatest likelihood of full-time continued employment shall be considered for this service.</i></p>	
<p>(5) Customized training shall be conducted only in occupations that provide opportunity for advancement and self-sufficiency. (WIA Final Rule 663.230)</p>	

Draft Policy	Committee & Public's Comments
<p>(6) For employed workers, customized training shall target low-skilled workforce as determined by wage level, basic skill deficient, language barrier, lacks High School Diploma, less than 1 year work experience, and other barriers to advancement. It shall also target high-skilled workers that are unemployed and need retraining, and the unemployed age 55 or over that are re-entering the workforce and need upgrade skills training. (Local Policy)</p>	
<p>(7) In cases of limited funds, customized training priority shall be given to local businesses in economically distressed areas, such as the Enterprise Zone or the Federal Renewal Community. "Limited funds" shall be defined by the WISF Board. Customized Training resources shall be aligned, where possible and appropriate, with economic development. As job quality is the absolute standard, priority shall be given to jobs with good job qualities, such as high retention rate, wage advancement opportunity, provide employees with greatest opportunity to become self-sufficient and sustain long-term growth within the company over the location of the businesses. (Local Policy)</p>	
<p>(8) Training providers shall be identified through a continuous and open process that to the greatest extent allows for rapid turnaround and employer's choice. <u>Consistent with federal contracting requirements. Employer will make the final selection of the training provider, consistent with this policy.</u> Once Local Board identifies the "high demand occupations", staff shall establish a list of selection criteria to be included in the solicitation. Selection criteria will include, but not limited to the <u>organization's ability to receive federal funds, cleared of any federal fraud convictions, and Equal Opportunity Employer.</u> Priority shall be given to San Francisco trainers. (Local Policy) <i>Staff may need to conduct legal studies and report back to Committee with various scenarios as this draft policy may hinder other employer-friendly efforts listed in this draft, such as Rapid Turnaround, and employer's choice.</i></p>	

Draft Policy	Committee & Public's Comments
<p>(9) For employed workers, customized training is limited to individuals not earning a self-sufficient wage as determined by WISF Board. A self-sufficiency standard adjusted for family size will need to be adopted by the WISF Board.</p> <p>(WIA Final rule 663.720)</p>	
<p>(10) Each customized training project shall be monitored and evaluated for performance and continuous improvement purposes.</p> <p>(Local Policy)</p> <p>Project will be evaluated on employers' and trainees' satisfaction, completion rate, trainees' passed competency tests administered by companies if appropriate, retention rate, and wage after training. Labor market needs and data on impact on employers' recruitment cost, retention, turnover and staffing pattern change, shall also be gathered.</p> <p>Staff shall report these data to the Board on a quarterly basis and a more comprehensive report to the Employer Services Committee on a quarterly basis.</p>	
<p>(11) In instances where the employer pays 100% of the training costs, policies (3), (4), and (6) are waived.</p> <p>(Local Policy)</p>	
<p>(12) Customized training trainees shall make a good faith effort to advance to higher skilled jobs after successful completion of training.</p>	
<p>(13) Customized training shall be accessible through the one-stops, or coordinated through training providers, or partner agencies of the WISF network.</p> <p>(Local Policy)</p> <p><i>The program shall be designed using a multi-faceted approach on how the employers are engaged.</i></p>	
<p>(14) Funds used for Customized Training shall be prioritized in the following order: (1) Private funds, (2) Employment and Training Panel (ETP) funds, (3) Pell Grants, and (4) WIA funds</p> <p>(Local Policy)</p> <p><i>To complement the Rapid Turnaround concept, WIA Adult Funds may need to be used up-front to pay for the training when reasonable and appropriate and</i></p>	

be reimbursed by other eligible sources of funding, even though the trainee is eligible for other sources of funding.	
(15) The Board shall reserve the right to deny customized training services to anyone, if the service is deemed cost ineffective.	

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**DRAFT MINUTES OF THE
MARCH 26, 2003 MEETING OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

William Allen, Steve Arcelona, Theresa Feeley, Nathan Nayman, and Stan Warren

ABSENT:

Kathye Citron, Corliss Fong, John Poremba, and Ave Seltsam

STAFF:

Alice Chiu, Robert Hernandez, Lucia Hughes, and Robert Schwab

PUBLIC:

Ernest Ip, Patricia Peretz, Missy Raglin, and Kevin Stange

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JUN 23 2003

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The meeting was convened at 9:30 P.M. A quorum was established at 10:00 A.M.

Chair Nayman asked that public testimony be taken at the time of the agenda items.

Robert Schwab reported that the Executive Committee met and adopted Program Resources Committee's recommendations for a certain amount set aside for cost reimbursement. He informed the Committee that staff had attempted to consolidate all the committees' (One Stop, Program Resources, and Employer Services) recommendations for allocation of WIA Adult funds and was deferred to the next meeting, as well as the Employer Services Committee's recommendation.

Chair Nayman asked how were the recommendations received. Mr. Schwab responded that there were unanswered questions and the Executive Committee was reluctant to adopt the recommendations without Employer Services Committee representation.

Theresa Feeley added there was public testimony from the Committee of Community Agencies regarding insufficient funds for customized training.

Mr. Schwab added that the One Stop Committee has met since the Executive Committee and have adopted a percentage budget. He also informed the Committee that the Executive Committee adopted an RFP that encourages community organizations to partner with employers. He added that there are likes of customized training programs in existence (On-the-Job-Training) but they are more job seeker-driven not employer-driven.

Motion to adopt agenda was made by Theresa Feeley and seconded by William Allen.

Ayes: William Allen, Steve Arcelona, Theresa Feeley, and Stan Warren

Nays: None

Abstentions: None

Motion passed.

Motion to adopt the minutes from the February 26, 2003 meeting was made by Steve Arcelona and seconded by William Allen.

Ayes: William Allen, Steve Arcelona, Theresa Feeley, and Stan Warren

Nays: None

Abstentions: None

Motion passed.

Item 4 – Customized Training Policy Recommendations

Robert Schwab presented further refinements to the customized training policy. The amendments were:

Policy #1 – “Employer shall make a good faith effort to hire (for Pre-Employment Training) or advance (for existing employee) trainee upon successful completion.”

Policy #4 – “Customized training shall be related to employment opportunities or growth occupations identified by the Local Board.”

Policy #8 – “Training providers shall be identified through a continuous and open process that to the greatest extent allows for rapid turnaround and employer’s choice, consistent with federal contracting requirements. Employer will make the final selection of the training provider, consistent with this policy. Once Local Board identifies the “high demand occupations”, staff shall establish a list of selection criteria to be included in the solicitation. Selection criteria will include, but not limited to, the organization’s ability to receive federal funds, cleared of any federal fraud convictions, and Equal Opportunity Employer. Priority shall be given to San Francisco trainers.”

Policy #9 – “For employed workers, customized training is limited to individuals not earning a self-sufficient wage ~~adjusted for family size~~ as determined by WISF Board. A self-sufficiency standard will need to be adopted by the WISF Board.”

Policy #15 – “The Board shall reserve the right to deny customized training services funding to anyone, if the service is deemed cost effective.”

Policy #16 – Once the training provider, the employer, and the PIC, Inc. have agreed that there is a need to develop a training curriculum, the approval for funding for the project shall take no longer than 30 days.

Motion to adopt the customized training policy recommendations was made by Theresa Feeley and seconded by Steve Arcelona.

Ayes: William Allen, Steve Arcelona, Theresa Feeley, and Stan Warren

Nays: None

Abstentions: None

Motion passed.

Item 5 – Program Performance Updates

Mr. Schwab presented program performances to the Committee as requested at the last meeting.

Theresa Feeley requested that there be a “retention” column. Kevin Stange responded that most contracts have 90-day follow-ups. Ms. Feeley suggested two columns – “90-days” and “more than 90-days”.

She also suggested adding a footnote to define "placement" for each funding stream and a first column be added to show how much is spent on each program defined by "total and cost".

Item 6 – Business on Board II

Lucia Hughes presented a draft plan for the Business on Board II. The proposed date of the half-day event is Friday, October 24th. In conjunction with the WISF Board's 2003 goal, Leverage Partnerships, it was recommended that the event be titled, "Business on Board II – Creating Workforce Synergy".

Event Objectives

- o Learn about the current local economy and workforce-related economic initiatives
- o Learn about the existing partnerships between employers and the San Francisco workforce network – what's working and what can be improved
- o Learn about upcoming partnership initiatives
- o Learn about ways to cultivate relationships between employers, employees, and workforce development organizations

Format Options

- o Highly Interactive
- o Interactive and Informational
- o Panel Presentations
- o Working Groups/Breakout Sessions

Committee's Roles and Responsibilities

- o Solicit sponsorships
- o Secure prominent keynote speaker
- o Marketing – through newspaper announcements, ethnic Chambers and through other channels those members are familiar with
- o ESC members take leadership to ensure participation through achievement of the following targets:
 - o Each member secures sponsorships of \$3000 in cash or services
 - o Each member secures registration of at least three private sector businesses to attend

Theresa Feeley commented that staff should see if there were similar conventions happening to avoid redundancy. She added that this might be an opportunity to market the customized training program.

Chair Nayman asked that staff distribute the information to the Board and ask for feedback on whether or not the Business on Board II should take place. He asked that the item be tabled to the next meeting.

Item 7 – One Stop Committee Report

Robert Schwab presented a brief report on the recent meeting of the One Stop Committee. The Committee met on March 19, 2003 and adopted a percentage budget. The budget proposed that a baseline level of funding be contributed to support of the development and operation of the One Stop system and the comprehensive full service Center (10% for PIC Administration, 15% for PIC Operations and Management, 13% for One Stop System Support and Technology, and 62% for WIA Training). It was also recommended that if this year's allocation is less than 10% of last year's allocation, then the Committee would evaluate the budget again.

Public Testimony on Non Agenda Items

Greg Marutani announced that the Occupational Outlook Labor Market Information will be distributed.

Chair Nayman asked if there were any press releases and if so, to forward to Committee Members for dissemination.

Motion to adjourn meeting was made by Theresa Feeley and seconded by William Allen.

Ayes: William Allen, Steve Arcelona, Theresa Feeley, and Stan Warren

Nays: None

Abstentions: None

Motion passed.

The Committee adjourned at 11:10 A.M.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Notice of Public Meeting

F
74.53
1/22/03
Cancelled
Please note that the Employer Services Committee Meeting scheduled for April 22, 2003 is cancelled.

The Committee is scheduled to meet on May 23, 2003.

Thank you for your immediate attention.

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APR 16 2003

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rescheduled

4/22/03

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Please note that the Employer Services Committee scheduled for April 30, 2003 is rescheduled to April 22, 2003 from 9:30 AM to 11:30 AM. The location of the meeting will be announced at a later date.

Thank you for your immediate attention.

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MAR 13 2003

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174.53
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canceled
5/28/03

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Please note that the Employer Services Committee Meeting scheduled for May 28, 2003 is cancelled.

The Committee is scheduled to meet on June 25, 2003.

Thank you for your immediate attention.

15-27-03A11110 0111

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MAY 23 2003

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

EMPLOYER SERVICES COMMITTEE (ESC)

Date: Wednesday, June 25, 2003
Time: 10:30 a.m. – 12:30 p.m.
Location: Auditorium
Community College District Office
33 Gough Street
San Francisco, CA 94103

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JUN 23 2003

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Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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OTHER ACCOMMODATIONS

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Issued: Wednesday, June 18, 2003

**PROPOSED AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
WEDNESDAY, JUNE 25, 2003**

1. Adoption of the Agenda (*Action Item*)
2. Adoption of Minutes from the Meeting Held on March 26, 2003 (*Action Item*)*
3. Public Testimony Agenda Items (Discussion Item)
4. Customized Training Delivery Model (Discussion Item)
5. Customized Training Incumbent Worker's Eligibility (Action Item)
6. Business On Board II Update (Discussion Item)
7. One-Stop Operations and Services Committee Report (Discussion Item)
8. Public Testimony on Non-Agenda Items (Discussion Item)
9. Future Agenda Items (Discussion Item)
10. Adjournment (*Action Item*)

* Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Notice of Public Meeting

F
W 74.53
#1
7/30/03
Cancelled

Please note that the
Employer Services Committee
Meeting scheduled for July 30,
2003 is cancelled.

Thank you for your immediate
attention.

DOCUMENTS DEPT.

JUL 25 2003

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7-5-03 AT 11:11 AM

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

≡ Notice of Public Meeting

Please note that the
Employer Services Committee
Meeting scheduled for
September 24, 2003 is
cancelled.

The Committee is scheduled to
meet on October 29, 2003.

Thank you for your immediate
attention.

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SEP 22 2003

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Please note that the
Employer Services Committee
Meeting scheduled for October
29, 2003 is cancelled.

The Committee is scheduled to
meet on December 17, 2003.

Thank you for your immediate
attention.

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OCT 22 2003

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

EMPLOYER SERVICES COMMITTEE (ESC)

DOCUMENTS DEPT.

DEC 16 2003

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Date: Wednesday, December 17, 2003
Time: 9:30 a.m. – 11:30 a.m.
Location: Van Ness Plaza
1650 Mission Street, 2nd Floor
Classrooms 4 and 5

12-16-03P02:19 RCVP

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Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
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Issued: Friday, December 12, 2003

Proposed Agenda
Employer Services Committee
9:30 AM
December 17, 2003

Agenda Item	Presenter	Time
1. Adoption of the Agenda (<i>Action Item</i>)	Nathan Nayman	2 min
2. Adoption of Minutes from the meeting held on September, 2003 (<i>Action Item</i>)	Nathan Nayman	2 min
3. Public Testimony of Agenda Items (<i>Discussion Item</i>)	Nathan Nayman	5 min
4. Employer Forum Report (<i>Information Item</i>)	Corliss Fong/ Ave Seltsam	10 min
5. One-Stop Business Plan (<i>Discussion & Possible Action Item</i>)	Robert Schwab	30 min
6. Customized Training Update (<i>Information Item</i>)	Robert Schwab	15 min
7. Employment Training Panel Workgroup Update (<i>Information Item</i>)*	Robert Schwab	10 min
8. Employer Services Committee meeting dates for 2004 (<i>Information Item</i>)	Nathan Nayman	3 min
9. Public Testimony on Non-Agenda Items (<i>Discussion Item</i>)	Nathan Nayman	5 min
10. New Business (<i>Discussion Item</i>)	Nathan Nayman	10 min
11. Adjournment (<i>Action Item</i>)	Nathan Nayman	5 min

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: PROGRAM RESOURCES COMMITTEE (PRC) **DATE:** NOVEMBER 25, 2003
EMPLOYER SERVICES COMMITTEE (ESC)

FROM: KAREN HART, STAFF TO THE PRC
TONY LUGO, STAFF TO THE PRC
LUCIA HUGHES, STAFF TO THE ESC
ROBERT SCHWAB, STAFF TO THE ESC

SUBJECT: REPORT ON EMPLOYMENT TRAINING PANEL (ETP) TASKFORCE (AGENDA
ITEM #7 FOR PRC DECEMBER 2ND MEETING)

Subsequent to a recent ESC meeting and the ETP presentation at the October 7, 2003 PRC meeting, Staff were asked to convene a Taskforce to study the feasibility of and processes for applying for ETP funds in order to grow the Workforce Investment San Francisco's (WISF) "pie". A meeting was held on October 15, 2003 with the following in attendance:

Steve Arcelona (DHS)
Cyndi Cravens (JVS)
Wes Dixon (PIC)
Karen Hart (PIC)
Lucia Hughes (PIC)
Tony Lugo (DHS)
Tom Ryan (SF Labor Council)
Robert Schwab (PIC)
Elizabeth Toups (JVS)

This was the first ETP meeting, many issues were discussed and a "to do" list was prepared.

DISCUSSION AREAS

(1) Timing of Grant Funds

Traditionally, the disbursement of ETP funds is project-based, which means that funding is granted by the ETP acceptance of individual, specific project applications. We cannot ask for a million dollars and later inform the ETP what projects we intend to fund. In addition, ETP cannot meet the rapid turnaround concept that the Employer Services Committee has committed to carry out, as the application and documentation gathering phases of the ETP are very time consuming and cumbersome.

It previously was suggested that Staff explore the possibility of using WIA money as bridge money while an application for ETP funds is being developed and processed. Staff asked the ETP if this was possible, and the answer was "no". However, we could use other funds for rapid turn-around customized training projects and apply for ETP funds for other customized training projects that will not require rapid implementation.

(2) Role of WISF/PIC

- a. Should the WISF/PIC apply for ETP funds on behalf of a consortium of Community-Based Organizations (CBOs) or employers?
- b. Should the WISF/PIC emulate the SF Works model, which uses Foundation dollars to back up projects funded by ETP?
 - i. This model places the PIC as the contractor with the ETP, and the employer as the subcontractor with PIC, and raises liability issues for the PIC if the employer cannot meet specific ETP requirements especially during the post training period.
- c. Should the WISF/PIC be the ETP intermediary/navigator for the public workforce system?
 - i. The focus is on the Employer as the contractor;
 - ii. The WISF/PIC will bring all the partners (employers/ CBOs) together;
 - iii. The WISF/PIC will broker and invest in relationships by having a Business Services Representative assist employers and others through the process and help with paperwork;
 - iv. The WISF/PIC may assist in the development of training curriculum;
 - v. Funds will be accessed by the employer;
 - vi. An administrative fee up to 15% of what the employer earns would be paid to the WISF/PIC if so negotiated with the employer, subject to ETP approval.
- d. If the WISF/PIC elects to use one of the above models, should the WISF/PIC seek to fund *new hire* or *incumbent worker* training or both? Incumbent worker training may have reduced liability risks, as the probability of incumbent workers meeting the retention requirement has apparently been higher than for new hires.

(3) ETP Legislation, Regulations, and Process

- a. There have been discussions at the WISF's committees about requesting changes to the ETP legislation and/or regulations. The workgroup felt that research on the current legislation and regulations is necessary. The Workgroup needs to read the legislation and regulations, determine specific problematic areas and if they are regulatory or legislative issues, and continue to confer with ETP staff and people that have used the system.
- b. Some examples shared by the Workgroup members who have experienced the ETP process are:
 - i. 90-day retention period at a certain wage is challenging, but for incumbent workers, it's not as risky as it is for new hires.
 - ii. Eligible employers are limited only to employers that pay into the unemployment fund and have certain job classifications.
 - iii. The wage requirement for eligibility and post-training is hard to meet.
 - iv. For new hires, it is very risky to track people after training and obtain proof of employment.
 - v. SOST (Structured, On-Site Training) requirement is difficult to document. One needs to prove that the skills that people are trained for match the skills required on the job.

Next Steps For The ETP Taskforce:

- (1) Read the ETP legislation, including amendments, and determine who appoints the Panel;
- (2) Determine the relationship between ETP and EDD;
- (3) Explore possibility of using ETP funds to serve Foster Youth;
- (4) Obtain a complete application package from ETP with full explanation;
- (5) Obtain an employer list organized by industry sectors;
- (6) Invite Staff from the San Mateo ETP office to next ETP Taskforce meeting;
- (7) Survey employers that have used ETP before.

Additional ETP Taskforce meetings have not yet been scheduled.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**DRAFT MINUTES OF THE
FEBRUARY 2, 2004 JOINT MEETING OF THE
EMPLOYER SERVICES COMMITTEE AND
ONE STOP COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

DOCUMENTS DEPT.

JUN 21 2004

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The meeting was held in Classroom 4 and 5 of Van Ness Plaza located at 1650 Mission Street in San Francisco, California 94103.

PRESENT:

William Allen (1:20), James Buick, Rosalie Bulach, Nicholas de Lorenzo, Devra Edelman, Theresa Feeley, Phyllis McGuire, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski and Abby Snay

ABSENT:

Steve Arcelona, Kathye Citron, Corliss Fong, Craig Newmark, Ave Seltsam and Stan Warren

WISF STAFF:

Alice Chiu, Cathy de Cristofaro, Sean Hallisey, Karen Hart, Lucia Hughes, Greg Johnson, Tony Lugo, Emma Perez, Robert Schwab and Adrian Trujillo

PUBLIC (AS EVIDENCED BY SIGN-IN SHEET):

Dan Brajkovich, Hindolo Brima, Linda Deng, Garry Grady, Gwen Henry, Don Hesse, Bernard Leung, Janetta Nartey, Melody Powers, Nancy Rynd and Doug Yee

The meeting was convened at 1:05 P.M. The One Stop Committee established its quorum at 1:20 P.M. The Employer Services Committee did not establish a quorum.

Item 6 – One Stop Committee Workgroup Reports

A. Technology Workgroup Report

Emma Perez presented a report on activities lead by the Technology Workgroup. Ms. Perez provided an update on the installation of "Fast Track System" at Career Link Centers at 1800 Oakdale Avenue and 801 Turk Street. Ms. Perez reported to Committee Members that due to technical infrastructure challenges and schedule conflicts, the installation process has been prolonged or extended beyond the initial deadline of February 2004 but would be implemented by May 2004.

Ms. Perez announced the completion of a Fast Track Training Manual. The Training Manual was a recent project by Information Systems (IS) Staff to provide an instructional reference for the proficient use of the Fast Track System. Once implemented at the additional sites, the System will track statistics on the number and frequency of customers to a Center, and define the core services utilized at each center. Ms. Perez mentioned how enthusiastic IS Staff is about leading the project.

Ms. Perez provided the Committee members an activity report of data that was collected from the System implemented at the Mission - Career Link Center located at 3120 Mission Street. The report provide data, including the number of customers utilizing the Center and statistics on the services utilized.

Chair Bulach asked that staff continue to provide Career Center activity reports to One Stop Committee members.

B. Accessibility Workgroup Report

Darlene Rutkowski presented a report on activities by the Accessibility Workgroup. Ms. Rutkowski provided an update on two well-received Network Resource Fairs. Ms. Rutkowski stated that the events were held in Spring 2003 at the Career Link Center at 3120 Mission Street and on January 22nd at the Career Link Center at 801 Turk Street. There will be a third Network Resource Fair coordinated at the Southeast Career Link Center on Thursday, March 25, 2004. Ms. Rutkowski announced that the Accessibility Workgroup will provide a future report of the One Stop Career Link Centers and One Stop System compliance with the American Disabilities Act of 1990.

Cathy deCristofaro shared an employment opportunity announcement from the Private Industry Council of San Francisco, Inc., a Disability Program Navigator for the One Stop San Francisco System. Ms. deCristofaro stated the position would serve as an expert on workforce development issues and policies impacting persons with disabilities who are seeking employment, skill development, job retention assistance, or career advancement through the One Stop Career Center. She further explained that the position will be responsible for identifying challenges that exist within the One Stop San Francisco System for people with disabilities. Ms. deCristofaro urged members of both Committees to share the announcement with their constituents. The position is temporary, and will be a report to One Stop System Coordinator.

Nathan Nayman asked that the disability navigator job description be shared with the Committee Members.

C. Marketing Workgroup Report

There was no report from the Marketing Workgroup.

Motion to adopt agenda was made by Victor Revenko and seconded by James Buick.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Devra Edelman, Theresa Feeley, Phyllis McGuire, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Motion to adopt the minutes of the January 5, 2004 joint meeting was made by Victor Revenko and seconded by James Buick.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Devra Edelman, Theresa Feeley, Phyllis McGuire, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Item 4 – One Stop Business Plan

Robert Schwab presented an overview of the recommendation to approve the proposed "Narrative", "Goals", and "Potential Actions" for each of the eight Innovations from the draft San Francisco One Stop System Business Plan for January 2004 to January 2006. At its January 5,

2004 meeting, the Committees adopted the Innovations and decided that those activities ("goals", and "potential actions") for each Innovation are subjected to future modification based on feedback from the community and discussions at upcoming Joint Committee meetings. Chair Bulach appointed a working group (John Poremba, Devra Edelman and staff) to review written comments or proposed revisions and to incorporate them into the Plan.

John Poremba presented a working document that included comments and revisions to the "goals" and "potential actions" of the Plan. One of the suggestions was to remove the "challenges" and "goals" from the business plan. The working group felt it is unnecessary to identify the objectives of the potential actions taken.

Chair Bulach oppose that suggestion, stating that every plan should have goals. Goals are benchmarks in measure of success.

Victor Revenko asked if it was a language issue. Mr. Poremba replied that it is.

William Allen agreed that the plan needs goals in order to remain focus and suggested that the goals be restated or stated elsewhere.

Mr. Poremba commented that the Innovations adopted by the Committees are "goals" and the statements of action are plans to accomplish those Innovations. It seems redundant to state the "goals" in the Plan again.

Phyllis McGuire reiterated Mr. Poremba's comments and added that the "benefits" are goals as well. The "potential actions" relate to the Innovations. She also pointed out that the "challenges" are disturbing and discouraging.

Mr. Revenko suggested that the "benefits" and "goals" be combined into goal statements. Mr. Poremba suggested that it be called "objectives". Jim Buick agreed with Mr. Poremba's suggestion and added that the "goals" are like actions or to-dos.

Mr. Schwab reiterated the Committee's suggestion to combine "benefits" and "goals" and rename it "system of objectives".

Darlene Rutkowski commented that there would always be disagreement on language but pointed out that the hardest is implementation. Nathan Nayman agreed and suggested that staff work with the Operator Consortium on the implementation of the Plan. Mr. Poremba responded that the Consortium met with staff on January 20th and reached some agreement.

Mr. Schwab reminded the Committee of its request at its last meeting to review each of the Innovations and to discuss any changes as a joint group.

Chair Bulach suggested that the Committees proceed to review and discuss the recommended changes for the "potential actions" for each Innovation and staff would go back to rewrite the "benefits" and "goals" and present them at the next meeting.

Innovation #1:

Original – (Potential Action: Center Operator(s)) "Identify fiscal manager for Center and define responsibilities"

Amendment – "Identify fiscal agent for Center operator and define responsibilities"

Theresa Feeley suggested that there be a bullet in Innovation #1 that internally references Innovation #8. Mr. Schwab suggested restating Innovation #8 as a "benefit" in Innovation #1.

There was no public testimony on the suggested changes.

Motion to approve Innovation #1 as amended was made by Nathan Nayman and seconded by William Allen.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Devra Edelman, Theresa Feeley, Phyllis McGuire, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Innovation #2:

Original – (Potential Action: Center Operator(s)) "Be responsible for attaining the prescribed standards for delivery of the One Stop Career Center services"

Amendment – "Be responsible for attaining the prescribed standards established by the WIB for delivery of the One Stop Career Center services"

Original – (Potential Action: WISF Board) "Re-negotiate and execute partner MOUs with mandatory partners"

Amendment – "Re-negotiate and execute partner MOUs with mandatory partners and Access Points"

(Additional bullet to Potential Action: WISF Board)

"Explore the expansion and inclusion of Access Points concerning data collection and reporting and the technology required to do so"

Devra Edelman asked how the WIB would integrate the Access Points into the system with limited resources. Jim Buick suggested that the Committee of Community Agencies (CCA) presented their position on the swipe card technology.

Motion to approve Innovations #2 as amended was made by Nathan Nayman and seconded by William Allen.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Devra Edelman, Theresa Feeley, Phyllis McGuire, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Due to time constraints, the Committee proceeded to Agenda Item 5, "Approval of draft One Stop System Projected Expenditure Plan for WIA share of One Stop System expenses PY '03-04".

Item 5 – One Stop System Expenditure Plan

Robert Schwab presented an overview of the recommendation to approve the One Stop expenditure plan for the WIA share of the One Stop System expenses for PY '03-04. The WISF Board approved a WIA allocation related to the One Stop System in the amount of \$995,713. He informed the Committees that the System is currently operating without an approved budget.

The expenditure plan as presented meets both revised center expense projections and recommended system-wide costs.

{Theresa Feeley exits at 1:25 PM}

There was no public testimony on the suggested changes.

Motion to approve the Expenditure Plan was made by Darlene Rutkowski and seconded by William Allen.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Devra Edelman, Phyllis McGuire, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Item 4 (cont'd) – One Stop Business Plan

Innovation #3:

Original (Potential Actions: WISF Board) – “Evaluate Operator’s (s’) ability to provide neutral and objective Center management”

Amendment – “Evaluate Operator’s (s’) management of Centers”

There was no public testimony on the suggested changes.

Motion to approve Innovation #3 as amended was made by James Buick and seconded by William Allen.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Devra Edelman, Phyllis McGuire, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Innovation #4:

Delete (Potential Actions: WISF Board) – “Market to employers in their ‘language’, not ‘bureaucrat-ese”

Delete (Potential Actions: Partners) – “Be willing to give up individual identity & employer contacts for greater good”

There was no public testimony on the suggested changes.

Motion to approve Innovation #4 as amended was made by William Allen and seconded by Victor Revenko.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Devra Edelman, Phyllis McGuire, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Innovation #5:

Original – “Establish policy for administering a fee-based or fee-shared service through One Stop Centers for employers and job seekers”

Amendment – “Establish policy for administering a fee-based or fee-shared service through the system for employers and job seekers”

Original – “Convene taskforce of partners, cbo’s, consultants, etc, to develop plan, priorities and protocols for piloting fee-based services”

Amendment – “Convene taskforce of partners, cbo’s, employers, etc, to develop plan, priorities and protocols for piloting fee-based services”

Delete – “Implement delivery of fee-based services as directed by WISF Board, if applicable”

Original – “Utilize relationships with staffing firms and other for-profit human resource service providers to gauge competition, identify what’s unique about our offer, market to customers”

Amendment – “Utilize relationships with staffing firms and other human resource service providers to gauge competition, identify what’s unique about our offer, market to customers”

Motion to approve Innovation #5 as amended was made by Abby Snay and seconded by William Allen.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Devra Edelman, Phyllis McGuire, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski and Abby Snay

Nays: None

Abstentions: None

Motion passed.

The Committees will continue their discussion on Innovations #6-8, “narrative”, and “goals” at the next meeting.

Public Testimony on Non Agenda Items

There was no public testimony on non-agenda items.

Motion to adjourn was made by Victor Revenko and seconded by William Allen.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Devra Edelman, Phyllis McGuire, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski and Abby Snay

Nays: None

Abstentions: None

Motion passed.

The Committees adjourned at 3:05 P.M.

All written materials distributed at the meeting are posted on the Private Industry Council’s website, www.picsf.org, and incorporated by reference herein.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**NOTICE OF A PUBLIC MEETING
OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

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MAR 19 2004

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Date: Wednesday, March 24, 2004
Time: 10:00 a.m. to 12:00 noon
Location: Auditorium
Community College District Office
33 Gough Street
San Francisco, CA 94103

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San Francisco, CA 94102-4683
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Issued: Wednesday, March 17, 2004

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

**DRAFT AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
WEDNESDAY, MARCH 24, 2004**

1. Adoption of the Agenda (*Action Item*)
2. Adoption of Minutes from the February 2, 2004 meeting (*Action Item*)**
3. Public Testimony on Agenda Items (Discussion Item)
4. Customized Training Project Update (Discussion Item)*
5. Customized Training Review Process (Discussion Item)*
6. Customized Training Marketing Plan (Discussion Item)
7. Public Testimony on Non-Agenda Items (Discussion Item)
8. Future Agenda Items (Discussion Item)
9. Adjournment (*Action Item*)

* Information enclosed.

** Information to follow.

Summary

	Employer	Employer Contact	Training Provider (T.P.)	T.P. Contact	Participants Served	Status	Expected Funding
1	Jewish Home for the Aged	Sandra P. Epstein 415.334.2500	JVS	Abby Snay 415.391.3600	12	Funded	\$31,139.00
2	Not Specified	N/A	YCD	John Williams 415.822.3491	20	Cancelled	-0-
3	Hotel Consortium/ SF Labor Council	Walter Johnson 415.440.4809	CCSF	John Carrese 415.267.6565	33	Funded	\$10,000
4	Corporate Security Service	Ave Seltzam 415.543.3460	Syndi Seid	N/A	TBD	Development Stage	\$12,000 (estimate)
5	In Home Support Services	Margaret Baran	Arriba Juntos	Dalila Ahumada	25	Funded	\$5,000
6	In Home Support Services	Margaret Baran	Arriba Juntos	Dalila Ahumada	40	Funded	\$4,000
7	California Association of Health Facilities	Kenneth Merchant	In-House	30	TBD	Development Stage	\$67,500 (estimate)
8	SF Auto Return	John Pendleton	TBD	TBD	15	Development Stage	TBD
9	Multi-Employer Law Firms	Muli Employer	JVS	TBD	15	Funded	\$12,500
10	Multi-Employer Security Firms Local 24-7	Lagouri Associates	City College	Phyllis McGuire	20	Development Stage	\$15,000
11	Hotel Consortium/ SF Labor Council	Walter Johnson 415.440.4809	CCSF	John Carrese 415.267.6565	33	Funded	\$11,000
12	Home Health Advocates, Inc.	Alex Saldarriaga	Arriba Juntos	Dalila Ahumada	30	Development Stage	\$3,000 (estimate)
13	Home Health Advocates, Inc.	Alex Saldarriaga	Arriba Juntos	Dalila Ahumada	30	Development Stage	\$2,500 (estimate)
14	Bank of America	N/A	City College	Judy Teng	50	Development Stage	\$15,000 (estimate)
15	Wells Fargo	N/A	The Family School	Jeanetta Narthey	TBD	Preliminary Stage	TBD

16	Synergy Living, Inc.	Chad Lewis	Pacific Institute	Doris Bersing	25	Development Stage	\$5,000 (estimate)
17	Unnamed hotel	TBD	City College	Christine Salang	50	Preliminary	TBD

Customized Training Projects to Date:

1. **Jewish Home for the Aged**

On July 1, 2003 the PIC pledged \$31,139.00 to Jewish Vocational Service to operate a customized training program for 12 San Francisco residents for employer Jewish Home for the Aged. The project completed its first cycle, 5 individuals were trained (please refer to the attached WIA Adult Self-Evaluation). The second cycle started on March 9th, seven participants were enrolled in this project.

2. **YCD Client**

On July 1, 2003 the PIC pledged \$59,780.00 to Young Community Developers to operate a customized training program for 10 San Francisco residents. An employer was not identified. On October 24, 2003 this contract was cancelled.

3. **Hotel Consortium/ San Francisco Labor Council**

Funding for this project was approved on January 14, 2004. Training starts on February 16, 2004 until April 7, 2004 run for eight weeks.

4. **Corporate Security Service**

CSS has expressed an interest in the Customized Training Program to train security guards in proper business etiquette. CSS submitted a letter to the PIC on January 30, 2004 expressing intent to submit a Customized Training proposal to the PIC in the coming weeks. We have identified the security industry as being an industry well suited to the Customized Training Program and so are gratified with this opportunity.

5 & 6 **In Home Support Services (ISS)**

On February 27, 2004 ISS and Arriba Juntos (AJ) jointly submitted two proposals for funding: The one referenced as #5 above is designed to train existing Home Care Aides in Vocational English As a Second Language. The one referenced as #6 above is designed to train existing Home Care Aides in job enhancement skills. The Executive Committee approved these proposals for funding on March 17, 2004.

7. **California Association of Health Facilities (CAHF)**

We have been approached by the California Association of Health Facilities (an employer trade association) to discuss the possibility of using the Customized Training funds to provide career-ladder training to health care workers. PIC staff and CAHF representatives met on Feb. 23, 2004 to explore the possibility of partnership in the program. CAHF is in the process of developing a proposal for funding. CAHF has operated a successful Customized Training with the San Diego WIB and would like to duplicate that success in San Francisco.

8,9, 10 SF Auto Return, Multi -Employer Law Firms, and Multi-Employer Security Firms

These employers are introduced to the Customized Training program by SF Works. The multi-employer law firms project is scheduled to start in April. The Executive Committee approved the funding of the Multi-Employer Law Firms project on March 17, 2004.

11. Hotel Consortium/ San Francisco Labor Council

The Consortium has expressed interest in submitting a second proposal for funding the same training as referenced in #3 as soon as possible. The projected start date of the program is April 12, 2004. A different group of hotels is involved in this project. The Executive Committee approved the funding of this project on March 17, 2004.

12. Home Health Advocates, Inc. (HHA)

HHA has approached the PIC to train approximately 30 incumbent Home Health Aides and Certified Nursing Assistants in specialized Alzheimer / Dementia care.

13. Home Health Advocates, Inc. (HHA)

HHA expressed interests in providing Care Management System training to new employees as a condition of hire. This project and the above project are scheduled to start by May, 2004.

14. Bank of America (B of A)

B of A, City College and PIC staffs had preliminary discussions about a possible customized training partnership. B of A intends to retrain approximately 500 individuals into different positions within B of A to avert a massive layoff and to advance the skills of these individuals. The program is expected to train 50 individuals at a time. If funded, WIA share for the entire training is estimated at \$125,000. A subsequent meeting between B of A, City College and PIC staff is scheduled to take place on March 12, 2004.

15. Well Fargo Bank

The Family School had a preliminary discussion with Wells Fargo bank on Customized Training. Wells Fargo is very much interested to further explore this opportunity.

16. Synergy Living, Inc.

Synergy Living, Inc. identified a need to train its existing health care workers in specialized mental health awareness training. Synergy is in discussion with its training provider to submit a joint proposal to the PIC before June.

17. Unnamed hotel

City College of San Francisco contacted us on March 11, 2004 related to a Customized Training project for 25 participants for a major hotel in San Francisco. A meeting has been scheduled for March 16, 2004. Staff will report to the Finance Subcommittee at the Subcommittee meeting.

Customized Training

POLICY	
<p>(1) Employer shall make a good faith effort to hire (for Pre-Employment Training) or <u>advance</u> (for existing employee) trainee upon successful completion of training. (WIA Sec.101(8); Final Rule 663.715(b) <i>Employers and training providers will define the term "successful" up-front, and may include the employer's measure of skill attainment.</i> <i>Advancement may take the form of wage enhancement and/ or increase in job responsibilities for existing employees.</i></p>	<p>(5) Customized training shall be conducted only in occupations that provide opportunity for advancement <u>and</u> self-sufficiency. (WIA Final Rule 663.230)</p>
<p>(2) Employer must pay for at least 50% of the training cost plus a negotiated administrative fee where applicable. (WIA Sec 101(8); Final Rule 663.715) (b) <i>In cases where employers are unable to pay for at least 50% of the training cost, private funds, such as philanthropic dollars, may be used to substitute the employer's fee.</i> In-kind contribution to offset the employer's share may be allowed based on funding source requirement.</p>	<p>(6) For employed workers, customized training shall target low-skilled workforce as determined by wage level, basic skill deficient, language barrier, lacks High School Diploma, less than 1 year work experience, and other barriers to advancement. It shall also target high-skilled workers that are unemployed and need retraining, and the unemployed age 55 or over that are re-entering the workforce and need upgrade skills training. (Local Policy)</p>
<p>(3) Customized training shall be available to San Francisco and SFO businesses. (Local Policy)</p>	<p>(7) In cases of limited funds, customized training priority shall be given to local businesses in economically distressed areas, such as the Enterprise Zone or the Federal Renewal Community. "Limited funds" shall be defined by the WISF Board. Customized Training resources shall be aligned, where possible and appropriate, with economic development. As job quality is the absolute standard, priority shall be given to jobs with good job qualities, such as high retention rate, wage advancement opportunity, provide employees with greatest opportunity to become self-sufficient and sustain long-term growth within the company over the location of the businesses. (Local Policy)</p>
<p>(4) Customized training shall be related to employment opportunities or growth occupations identified by the Local Board. ("Linked to the Employment Opportunities in the Local Area..." WIA Sec 134 (4)(A) (iii)) <i>Jobs that provide the greatest opportunity for growth, and for the greatest likelihood of full-time continued employment shall be considered for this service.</i></p>	<p>(8) Training providers shall be identified through a continuous and open process that to the greatest extent allows for rapid turnaround and employer's choice. Consistent with federal contracting requirements. Employer will make the final selection of the training provider, consistent with this policy. Once Local Board identifies the "high demand occupations", staff shall establish a list of selection criteria to be included in the solicitation. Selection criteria will include, but not limited to the organization's ability to receive federal funds, cleared of any federal fraud convictions, and Equal Opportunity Employer. Priority shall be given to San Francisco trainers. (Local Policy)</p>

POLICY

<p>(9) For employed workers, customized training is limited to individuals not earning a self-sufficient wage as determined by WISF Board. A self-sufficiency standard will need to be adopted by the WISF Board. (WIA Final rule 663.720)</p>	<p>(14) Funds used for Customized Training shall be prioritized in the following order: (1) Private funds, (2) Employment and Training Panel (ETP) funds, (3) Pell Grants, and (4) WIA funds (Local Policy) <i>To complement the Rapid Turnaround concept, WIA Adult Funds may need to be used up-front to pay for the training when reasonable and appropriate and be reimbursed by other eligible sources of funding, even though the trainee is eligible for other sources of funding.</i></p>
<p>(10) Each customized training project shall be monitored and evaluated for performance and continuous improvement purposes. (Local Policy) Project will be evaluated on employers' and trainees' satisfaction, completion rate, trainees' passed competency tests administered by companies if appropriate, retention rate, and wage after training. Labor market needs and data on impact on employers' recruitment cost, retention, turnover and staffing pattern change shall also be gathered. Staff shall report these data to the Board on a quarterly basis and a more comprehensive report to the Employer Services Committee on a quarterly basis.</p>	<p>(15) The Board shall reserve the right to deny customized training funding to anyone, if the service is deemed cost ineffective. (Local Policy)</p>
<p>(11) In instances where the employer pays 100% of the training costs, policies (3), (4), and (6) are waived. (Local Policy)</p>	<p>(16) Once the training provider, the employer, and the PIC, Inc. have agreed that there is a need to develop a training curriculum, the approval for funding for the project shall be no longer than 30 days. (Local Policy)</p>
<p>(12) Customized training trainees shall make a good faith effort to advance to higher skilled jobs after successful completion of training. (Local Policy)</p>	
<p>(13) Customized training shall be accessible through the one-stops, or coordinated through training providers, or partner agencies of the WISF network. (Local Policy) <i>The program shall be designed using a multi-faceted approach on how the employers are engaged.</i></p>	

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**DRAFT MINUTES OF THE
MARCH 24, 2004 MEETING OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

The meeting was held in the Auditorium of Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

Steve Arcelona, Theresa Feeley, Nathan Nayman, and Ave Seltsam

DOCUMENTS DEPT.

JUN 21 2004

ABSENT:

William Allen, Kathy Citron, John Poremba, and Stan Warren

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WISF STAFF:

Alice Chiu, Cathy de Cristofaro, Sean Hallisey, Karen Hart, Lucia Hughes, Greg Johnson, Tony Lugo, Emma Perez, Robert Schwab and Adrian Trujillo

PUBLIC (AS EVIDENCED BY SIGN-IN SHEET):

Dan Brajkovich, Hindolo Brima, Linda Deng, Garry Grady, Gwen Henry, Don Hesse, Bernard Leung, Janetta Nartey, Melody Powers, Nancy Rynd and Doug Yee

The meeting was convened at 10:09 A.M. The Employer Services Committee did not establish a quorum.

Chair Nayman asked that public testimony on agenda items be taken at the time of the presentation of the item.

Items 4 – 6 – Customized Training Pilot Program Review

Chair Nayman gave a brief explanation why the Committee is having a review discussion of the customized training program. He informed the Committee that he was surprised to see four customized training proposals on the March 17th Executive Committee agenda for approval. He had expected to have been able to review and comment on the proposals before presenting them to the Executive Committee. He had concerns that the program has become an "insider's game", granting funds to organizations that are already doing training. He had also hoped to have more marketing efforts to target small- to medium-sized businesses.

Pamela Calloway presented a review of the customized training pilot program. She reminded the Committee that the goal of the program was to "be a program available to San Francisco businesses that is easy to access and specifically tailored to a business' need". To date, \$210,103 of the \$300,000 WIA set aside fund is committed (with employers "matching" 50%), 13 employer participants, 313 employee participants, and the average WIA cost per participant is \$466.

As the program progressed, several implementation challenges became apparent. With procurement, the WIA currently requires competitive procurement of employers and training providers. In attempt to address this, the Private Industry Council, Inc. (PIC) requested Sole Source procurement authority from the Department of Labor on May 3, 2003. Ms. Calloway shared that response letter with the Committee; the response was imprecise and unclear. The

PIC then sought to request a waiver of requirement from the State of California, which was not provided under the Davis administration. As a result, the risk to the WISF Board is disallowed WIA costs because of noncompetitive procurements in pilot and OJTs (on the job training).

Possible solutions to resolve these procurement challenges are present risk management assessment to Executive Committee and WISF Board for action and re-submit waiver requests to Governor Schwarzenegger.

With process challenges, the Employer Services Committee is not currently making recommendations for approval of projects. She reminded the Committee that the goal was to have the projects approved within 30 days of application in order for a rapid turnaround. And currently, the Employer Services Committee and Executive Committee meet bi-monthly and funding decisions must be made at public meetings.

Ms. Calloway presented two options for solutions to the process challenges. Option A would be to amend the customized training policy to make more specific (i.e. demand occupation, emerging industry, business size, business status). The pros to that option are that it would clarify the objectives, guarantee 30-day approval, and delegate authority (by Executive Committee) to the President to enter contracts. The con, however, is that it would make the policy more narrow, which may exclude many business and workers. Option B would be to keep the policy open to any employer and schedule Special Meetings of quorum established Employer Services Committee to provide recommendations. The pro is that it maintains the flexibility of the customized training policy. The cons are that the contract may not be turned around the 30-days guarantee if the Committee does not achieve a quorum at its meetings.

Chair Nayman asked what qualifies as a quorum and if proxies are allowed. Ms. Calloway replied that a quorum is the majority of the Committee and proxies are not allowed.

Steve Arcelona asked how are OJTs processed and why it wouldn't be of the same problem.

Chair Nayman commented that the intent of the program was to have the Employer Services Committee to weigh in on the decision. He's not concern about the Committee not achieving its quorum; he would just like an opportunity to air out any concerns or questions and to have consensus among the Committee before approaching the Executive Committee.

Theresa Feeley expressed her concern about the level of Committee involvement. What if there were to be a large number of proposals that are coming at different times? Will the Committee be able to catch up? She suggested maybe to evaluate the projects once they are off the ground. She commented that it may be a matter of better communication. Since all Board and Committee Members receives materials for the Executive Committee prior to the meeting, perhaps the Employer Services Committee should review the proposals and bring questions or concerns to the Employer Services Chair to raise at the Executive Committee meeting or have Employer Service Committee attend the meeting to raise questions and concerns.

Public Testimony on Non Agenda Items

Steve Arcelona informed the Committee that Dwayne Jones has been named Executive Director of the Mayor's Office of Community Development.

Future Agenda Items

Theresa Feeley asked that there be an update on the budget pans for the customized training program.

The Committees adjourned at 11:30 A.M.

All written materials distributed at the meeting are posted on the Private Industry Council's website, www.picsf.org, and incorporated by reference herein.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**NOTICE OF A PUBLIC MEETING
OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

DOCUMENTS DEPT.

APR 15 2004

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PUBLIC LIBRARY

Date: Wednesday, April 21, 2004
Time: 12:00 noon to 2:00 p.m.
Location: Auditorium
Community College District Office
33 Gough Street
San Francisco, CA 94103

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

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Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724
Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

The Sunshine Ordinance is also available online at: www.sfgov.org/site/sunshine_index.asp?id=4673

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In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

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Lobbyist Registration and Reporting Requirements

Individuals and entities that influence or attempt to influence local legislative or administrative action may be required by the San Francisco Lobbyist Ordinance (SF Campaign & Governmental Conduct Code § 2.100) to register and report lobbying activity. For more information about the Lobbyist Ordinance, please contact the San Francisco Ethics Commission at 30 Van Ness Avenue, Suite 3900, San Francisco, CA 94102; telephone (415) 581-2300; fax (415) 581-2317; web site: sfgov.org/ethics.

Issued: Wednesday, April 14, 2004

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

**DRAFT AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
WEDNESDAY, APRIL 21, 2004**

1. Adoption of the Agenda (*Action Item*)
2. Adoption of Minutes from the January 5, 2004, February 2, 2004, and March 25, 2004 meetings (*Action Item*)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Customized Training Proposal Review (Discussion Item)*
Home Health Advocates, Inc. to Operate a Home Health Attendant Training Course
5. Public Testimony on Non-Agenda Items (Discussion Item)
6. Future Agenda Items (Discussion Item)
7. Adjournment (*Action Item*)

* Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE

DATE: APRIL 21, 2004

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: RECOMMENDATION TO REVIEW CUSTOMIZED TRAINING FUNDING TO HOME HEALTH ADVOCATES, INCORPORATED TO OPERATE A HOME HEALTH ATTENDANT TRAINING COURSE

ACTION REQUESTED

The Committee is asked to review the proposed Customized Training Proposal submitted by Home Health Advocates, Inc. with Arriba Juntos as the selected training provider. The total cost of the training is \$12,000. Home Health Advocates, Inc. will match WIA Customized Training Funds in the amount of no less than **\$6,000** to train 15 participants in basic Home Health Attendant skills.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost.

On April 9, 2004, the Home Health Advocates, Inc. and Arriba Juntos jointly submitted a proposal for funding of a Customized Training project.

Based on staff's review of the proposal, the Program intends to train a total of 15 individuals, some of which are existing workers who earn between \$9.00 and \$10.00 per hour, and some are unemployed individuals. The Program is designed to teach participants the skills necessary to work successfully as Home Health Attendants. Participants skills will be enhanced to increase marketability resulting in an increase in work hours or acquire employment. Participants will also be more assertive, confident on the job, and will be more reliable. After successful completion of the training program, the participants will have greater access to additional hours, or offered employment in the case of unemployed trainees.

The duration of the course is 30 hours, six hours per day for five days. The employer expressed good faith efforts in advancing individuals upon successful completion of the training. Advancement takes the form of more work hours or offered employment. As a result of the above observations, staff believes that the proposal meets all the requirements outlined in the Customized Training policy.

RECOMMENDATION

Staff recommends that the Employer Services Committee recommend to the Executive Committee the approval of the requested **\$6,000** funding for this Customized Training project.

If you have any questions prior to the meeting, please contact Robert Schwab at (415) 431-8700.



PRIVATE INDUSTRY COUNCIL
of San Francisco, Inc.

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employment
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CUSTOMIZED TRAINING PROPOSAL



I. EMPLOYER INFORMATION (To be completed by Employer):

Company: Home Health Advocates, Inc. Telephone #: (415) 348-6272
Address: 275 5th. Streeth Training Site Address (If Different):
San Francisco, CA 94103

Name & Title of Contact Person: Alex Saldarriaga, Principal
Individual(s) Authorized to Sign Invoices: Alex Saldarriaga, Principal
Federal Employer Identification Number: 87-0715035
State Identification Number: 233-9671 6
Workers' Compensation Policy Carrier: State Compensation Insurance Fund
Workers' Compensation Policy No.: 1755655-03 Expiration Date: 11/27/04
Number of full-time employees: 10 Incorporated: YES [X] NO []

II. TRAINING PROVIDER INFORMATION (To be completed by Training Provider):

Organization: Arriva Juntos Telephone#: (415) 487-3240
Address: 1850 Mission St., San Francisco, CA 94103
Name & Title of Contact Person: Dalila Ahumada, Excecutive Director
Federal Employer Identification Number: 94-1663434
PIC's Eligible Training Provider Lists (ETPL) Number (if applicable) _____

III. INSTRUCTOR'S QUALIFICATION (To be completed by Training Provider):

Name & Title of Instructor: Jude Ann Delphia, RN
Years of Relevant Experience: 30 years (Resume/ See attachment B)
Does he/she have a teaching certificate or other credential (if yes, please attach a copy)?
Yes / See Attachment A

References: Please attach at least two clients for which comparable training was performed by you.

IV. TRAINING PROGRAM DATA (To be completed by Employer and Training Provider): (use an attached sheet is necessary)

A	B	C	D
Trainee Name (For Current Employee)	Participant(s) Job Title (For Current Employee)	Pre- Training Wage	Post Training Title
Client recruitment in progress	Home Care Attendants	\$9.00 to \$10.00/hr	Participants skills will be enhanced to increase marketability resulting in an increase in work hours. Participants will also be more assertive. confident on the job, they will also be more reliable.

(a)

Recruitment:

Do you need help in the recruitment of trainees? yes

If so, how many trainees do you need to recruit? 5 to 10

(b)

Qualification:

Do you have an employee minimum qualification skill set? This would be a set of expected employee skills such as literacy and fluency in English, appropriate grooming skills, and the like.

(Yes) (please attach) see attachment C

No

Would you like PIC to provide one for you?

Yes

(No)

V. TRAINING COST (To be completed by Training Provider):

Complete and attach forms CTP 100 and CTP 222 as this will constitute your PIC invoice upon acceptance of proposal.

	Cost
A. INSTRUCTIONAL COST	11,850
B. TRAINING MATERIALS	150
C. TRAINING FEES	
TOTAL	12,000

VI. ORGANIZED LABOR CONCURRENCE: *(If under collective bargaining agreement, to be completed by Employer)*

Concurrence Given By: N/A

NAME OF UNION REPRESENTATIVE

Title: N/A Date: N/A

VII. TRAINING OUTLINE (to be completed by Employer and Training Provider)

OES JOB TITLE: N/A OES #: N/A

EMPLOYER'S TITLE FOR THIS JOB: Home Health Attendants

To Be Completed By the Training Provider

Include a detailed outline of training to be provided, tasks to be learned, and approximate hours of training required for each task. (Use an attached sheet if necessary.)

They will receive Certification of Completion (see Attachment D)

To Be Completed By the Employer

Provide a thorough description of the job skills for which training is being requested. (Use an attached sheet if necessary.)

Position description (see attachment E)

To Be Completed By the Employer

- (1) How would you define successful completion of training program? Please be specific, as this definition will be used to evaluate success of training program and the participants' suitability for post training placement/ advancement. (Use an attached sheet if necessary.)

Successful completion of the Skill enhancement training will be defined by the following participant outcomes:

Greater job marketability
Increase in ability to follow and understand policies and procedures
Greater job satisfaction becoming more self-sufficient, competent and confident in the ability to perform job tasks
Decrease the risk of client hospitalisations and or accidents
Increase in personal responsibilities, secondary to better skills knowledge
Increase in independability

- (2) Do you have an assessment tool to assess trainee's skills attainment?

☒ Yes

☐ No

If yes, please attach.

See attachment F

- (3) Please detail the number and type of positions that you plan to open, or the number of employees and type of positions that you plan to advance upon successful completion of the training. (Use an attached sheet if necessary.)

After completion of the training program, the participants will have a greater access to additional hours. Home Health Advocates, Inc. recruits approximately 10-20 Home Care Attendants in a monthly basis.

EMPLOYER ASSURANCES

As a condition of the Customized Training Agreement, the Employer must:

1. Identify customized training program participants.
2. Make good faith effort to hire or advance trainee(s) at the successful completion of the training within 30 calendar days. Advancement must take the form of wage increase, work hour increase, benefit increase or a combination of all three.
3. For the training of existing employees, provide the participants with an increase in benefits or earnings, and a greater potential for career advancement when compared with those received prior to their training.
4. Insure all trainees are not currently earning a self-sufficient wage that has been determined by the Local Board as \$13.78 per hour or \$2,388.93 per month. Providing supporting documentation such as salary records, W-2 forms or the like will satisfy this.
5. Fully complete Training Outline.
6. Pay at least 50% of the training cost plus any agreed upon administrative costs.
7. Make payment of the Employer Contribution to the PIC in two installments; 50% upon signing of the agreement, and the balance upon completion of the training program *regardless* of trainee(s)' training performance outcome.
8. Provide periodic data to PIC for monitoring review and continuous improvement purposes.

PIC ASSURANCES

As a condition of the Customized Training Agreement, the PIC will:

1. Administer the customized training funds.
2. Monitor the training provider's performance.
3. Facilitate communication between the employer and the training provider.
4. Report monthly, quarterly and annual program outcomes as needed for the Employer, the Training Provider and the WIB Employer Services Committee.
5. Provide trainee's eligibility certification.
6. Provide authorization of enrollment subject to the Employer's selection.
7. Retain license or title to intellectual, personal, and real property produced or purchased under the agreement
8. Approve Employer's successful completion criteria.

TRAINING PROVIDER ASSURANCES

As a condition of the Customized Training Agreement, the Training Provider must:

1. Comply with all provisions of state and federal equal opportunity and nondiscrimination laws including but not limited to, Title VI and VII of the Civil Rights Act of 1964, as amended; the Age Discrimination Act of 1975, as amended; Sections 503 and 504 of the Rehabilitation Act of 1973; and the Americans with Disabilities Act of 1990.
2. Not exclude from participation in, deny the benefits of, subject to discrimination by, or deny employment in the administration or any program or activity any individual because of race, color, religion, sex, national origin, age, disability, political affiliation or belief.
3. Comply with the child labor provisions of the Fair Labor Standards Act (FLSA.)
4. Comply with provisions that limit the use of funds for political activities.
5. Disclose lobbying activities pursuant to 31 USC 1352.
6. Establish safeguards to prohibit employees from using their positions for a purpose that is or appears to be for private gain for themselves or others, particularly those with whom they have family, business, or other ties.
7. Maintain of appropriate standards of health and safety in work and training.
8. Comply with the required provision of workers' compensation protection to participants in customized training, at the same level and to the same extent as other employees of the employers who are covered by a state or industry workers' compensation statutes; and provision of workers' compensation insurance or medical and accident insurance for injury or disease resulting from their participation.
9. Insure the program has adequate administrative controls, personnel standards, evaluation procedures, availability of in-service training and other policies as may be necessary to promote the effective use of the subcontract funds.
10. Insure all of the training provider's employees and all of its subcontractors (if applicable) will act professionally and will comply with all requirements of the federal Privacy Act, all pertinent requirements of California State law (specifically, section 1798.55 of its Civil Code, section 10850 of its Health and Welfare Institutions Code, section 501 of its Penal Code, and section 2111 of its Unemployment Insurance Code), all pertinent requirements of the San Francisco Administrative Code, agreements which the PIC has entered into with agencies of the Federal, State of California, and City and County of San Francisco governments and the PIC's policies and procedures in treating all particularized information on individual employers and participants confidentially, sharing such information only with other authorized persons or organizations, and formally requesting written authorization from the PIC before releasing such information in specific circumstances where the applicability of any of these requirements might be unclear.
11. Comply with the provisions of the Fair Employment and Housing Act (Govt. Code, Section 12900 et seq.) the regulations promulgated thereunder (California Administrative Code, Title 2, Section 285.0 et seq.) the provisions of Article 9.5, Chapter 1, Part 1, Division 11135 - 11139.5) and the regulations or standards implement such article.
12. Understand that it may be subject to the examination and audit of the Auditor General for a period of three years after final payment under the subcontract (Govt. Code Section 10532.)
13. Certify that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal debarment or agency (Executive Order 12549, Debarment, and Suspension, 29 CFR Part 98, Section 98.510, Participants' Responsibilities.)
14. Provide occupational skills training as subcontracted.
15. Assist the employer and employee with job retention services when necessary.

POLICY

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<p>(1) Employer shall make a good faith effort to hire (for Pre-Employment Training) or <u>advance</u> (for existing employee) trainee upon successful completion of training. (WIA Sec.101(8); Final Rule 663.715(b)) <i>Employers and training providers will define the term "successful" up-front, and may include the employer's measure of skill attainment. Advancement may take the form of wage enhancement and/or increase in job responsibilities for existing employees.</i></p>	<p>(5) Customized training shall be conducted only in occupations that provide opportunity for advancement and <u>self-sufficiency</u>. (WIA Final Rule 663.230)</p>
<p>(2) Employer must pay for at least 50% of the training cost plus a negotiated administrative fee where applicable. (WIA Sec 101(8); Final Rule 663.715) (b) <i>In cases where employers are unable to pay for at least 50% of the training cost, private funds, such as philanthropic dollars, may be used to substitute the employer's fee.</i> In-kind contribution to offset the employer's share may be allowed based on funding source requirement.</p>	<p>(6) For employed workers, customized training shall target low-skilled workforce as determined by wage level, basic skill deficient, language barrier, lacks High School Diploma, less than 1 year work experience, and other barriers to advancement. It shall also target high-skilled workers that are unemployed and need retraining, and the unemployed age 55 or over that are re-entering the workforce and need upgrade skills training. (Local Policy)</p>
<p>(3) Customized training shall be available to San Francisco and SFO businesses. (Local Policy)</p>	<p>(7) In cases of limited funds, customized training priority shall be given to local businesses in economically distressed areas, such as the Enterprise Zone or the Federal Renewal Community. "Limited funds" shall be defined by the WISF Board. Customized Training resources shall be aligned, where possible and appropriate, with economic development. As job quality is the absolute standard, priority shall be given to jobs with good job qualities, such as high retention rate, wage advancement opportunity, provide employees with greatest opportunity to become self-sufficient and sustain long-term growth within the company over the location of the businesses. (Local Policy)</p>
<p>(4) Customized training shall be related to employment opportunities or growth occupations identified by the Local Board. ("Linked to the Employment Opportunities in the Local Area..." WIA Sec 134 (4)(A) (iii)) <i>Jobs that provide the greatest opportunity for growth, and/or the greatest likelihood of full-time continued employment shall be considered for this service.</i></p>	<p>(8) Training providers shall be identified through a continuous and open process that to the greatest extent allows for rapid turnaround and employer's choice. Consistent with federal contracting requirements. Employer will make the final selection of the training provider, consistent with this policy. Once Local Board identifies the "high demand occupations", staff shall establish a list of selection criteria to be included in the solicitation. Selection criteria will include, but not limited to the organization's ability to receive federal funds, cleared of any federal fraud convictions, and Equal Opportunity Employer. Priority shall be given to San Francisco trainers. (Local Policy)</p>

Attachment: A

Certifications

BUREAU FOR PRIVATE POSTSECONDARY
AND VOCATIONAL EDUCATION400 R Street, Suite 5000
Sacramento, CA 95814

Phone: (916) 445-3428 FAX: (916) 323-6571



CERTIFICATE OF AUTHORIZATION FOR SERVICE

Judeann Delphia
c/o Arriba Juntos, Delalia Ahumada
1850 Misson
San Francisco, CA 94103

CERT No. NHAK-59RLKK2002

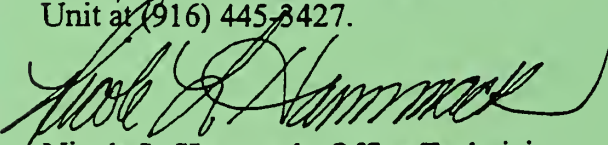
Judeann Delphia is authorized to serve as a **Instructor** in a California private postsecondary and vocational education institution approved under California Education Code (CEC) § 94915.

Nurse/Nursing Assistant/Aide**Expiration Date: 10/11/2005**

This authorization identifies and verifies that the individual holder has the academic, experiential, and/or professional qualifications described in CEC § 94920 to perform the duties of this position. This certification is **only valid** when the individual holder is employed with an approved California private postsecondary and vocational educational institution, and when the employer maintains: (1) a certified copy of educational transcripts for applicants whose qualification is based on education; (2) verification of employment history; and (3) a copy of any license or information required of administrative or instructional personnel by state agencies or licensing boards.

It is your responsibility to keep a copy of your certification for your records.

If you have any questions regarding your certification, please contact the Certificates of Authorization Unit at (916) 445-3427.



Nicole L. Hammack, Office Technician
Certificates of Authorization Unit
Bureau for Private Postsecondary and Vocational Education



BUREAU FOR PRIVATE POSTSECONDARY AND VOCATIONAL EDUCATION

Physical Address: 400 R Street, Suite 5000 Sacramento, CA 95814-6200
 Mailing Address: P.O. Box 980818 West Sacramento, CA 95798-0818
 Phone: (916) 445-3427 Fax: (916) 323-6571 (916) 322-2615
 Website: www.bppve.ca.gov



In accordance with the provisions of California Education Code 94900 and/or 94915, the Bureau for Private Postsecondary and Vocational Education approves:

ARRIBA JUNTOS

1850 MISSION ST
 San Francisco, Ca 94103
 School Code #: 3804781

INSTITUTIONAL APPROVAL

This institution has received approval to operate from the Bureau for Private Postsecondary and Vocational Education ("Bureau"). An approval to operate means that the Bureau has determined and certified that the institution meets the minimum standards for integrity, financial stability, and educational quality, including the offering of bona fide instruction by qualified faculty and the appropriate assessment of students' achievement prior to, during, and at the end of its programs.

Subject to earlier termination in accordance with the law.

Approval #: 18527

Effective Date: September 30, 2000

Expiration Date: September 29, 2004

Joanne Severson
 Joanne Severson, Private Postsecondary Education Administrator

This document is valid if all fees are current. Subject to earlier termination in accordance with the law.

This approval document is accompanied by the 'Approved/Registered Program List' and the 'Approved Branch/Satellite Location List'. These documents outline educational services and approved sites.



Bureau For Private Postsecondary And Vocational Education

Physical Address: 400 R Street, Suite 5000 Sacramento, CA 95814-6200

Mailing Address: P.O. Box 980818 West Sacramento, CA 95798-0818

Phone: (916) 445-3427 Fax: (916) 323-6571 (916) 322-2615

Website: www.bppve.ca.gov



Approved/Registered Program List

In accordance with the provisions of California Education Code 94900 and/or 94915 and/or Article 9.5, the Bureau for Private Postsecondary and Vocational Education approves:

ARRIBA JUNTOS
1850 MISSION ST
San Francisco, Ca 94103
School Code #: 3804781
Site Type: Main

to offer the following program(s)/course(s):

<u>Program Name</u>	<u>Length of Instruction</u>	<u>Program Approved</u>	<u>Program Type</u>	<u>Distance Learning</u>
AUTOMATED OFFICE SKILLS TRAINING*	400.00 Hours	08/01/1996	Non-Degree	No
CERTIFIED NURSING ASSISTANT TRAINING*	170.00 Hours	09/09/1993	Non-Degree	No
ESL/VESL	360.00 Hours	02/05/2003	Non-Degree	No
HOME HEALTH CARE AIDE TRAINING*	40.00 Hours	02/24/1995	Non-Degree	No
HOME CARE TRAINING	52.00 Hours	02/05/2003	Non-Degree	No

Non-Degree (Vocational) Programs/Courses: 5.00

Total Programs/Courses: 5.00

The program list above represents all currently approved/registered educational services for this institution. The Main, Branch, or Satellite locations of this institution may offer any subset of this list. Branch and Satellite location(s) may only offer educational services that are approved at the Main location as stated in Section 94719 and 94742(a) of the Private Postsecondary and Vocational Education Reform Act.

Shirley Geddes, Private Postsecondary Education Specialist

This document is valid if all fees are current. Subject to earlier termination in accordance with the law.



BUREAU FOR PRIVATE POSTSECONDARY AND VOCATIONAL EDUCATION

Physical Address: 400 "R" Street, Suite 5000 • Sacramento, CA 95814-6200
Mailing Address: P.O. Box 980818 • West Sacramento, CA 95798-0818
Phone: (916) 445-3427 • FAX: (916) 322-2615



February 5, 2003

Dalila Ahumada, Associate Director
Arriba Juntos
1850 Mission Street
San Francisco, CA 94103

School Code: 3804781

RE: INSTITUTIONAL RE-APPROVAL GRANTED

Dear Ms. Ahumada:

Congratulations! Your school is hereby granted approval under California Education Code (CEC) Section 94915 to operate as a private postsecondary educational institution in California. *This approval is effective September 30, 2000 and will expire on September 29, 2004.* The Bureau for Private Postsecondary and Vocational Education (Bureau) received a re-approval application on September 29, 2000. We have determined that your request for re-approval complies with the minimum standards contained in CEC Sections 94915(b), (f) and Title 5 of the California Code of Regulations section 73410.

For the purposes of administering and enforcing this chapter, the Bureau shall establish a regular inspection program, which shall include random and unannounced inspections. For the purposes of verifying compliance with this chapter, please be advised that the Bureau may conduct an unannounced inspection at your institution at any time prior to the expiration of your school's renewal to operate.

In accordance with CEC Section 94915(e)(1), "If the institution is in compliance with this chapter and has not operated within three years before the filing of the application in violation of this chapter then in effect, the council may grant approval for a *period not to exceed four years.*"

Enclosed is the Course Approval Document for your institution to offer the following specified approved program(s)/course(s):

Course Title	Credits
Automated Office Skills Training	400
Certified Nursing Assistant Training	170
ESL/VESL	360
Home Health Care Aide Training	40
Home-Care Training	52

The courses listed above are exempt from Article 7 / Maxine Waters Act based on CEC 94785 and/or CEC 94785 (c)

BUREAU FOR PRIVATE POSTSECONDARY
AND VOCATIONAL EDUCATION400 R Street, Suite 5000
Sacramento, CA 95814

Phone: (916) 445-3428 FAX: (916) 322-6571



CERTIFICATE OF AUTHORIZATION FOR SERVICE

Dalila Ahumada
1850 Mission Street
San Francisco, CA 94103

CERT No. NHAK-5JVLWJ2003

Dalila Ahumada is authorized to serve as a **Director** in a California private postsecondary and vocational education institution approved under California Education Code (CEC) § 94915.

Expiration Date:

This authorization identifies and verifies that the individual holder has the academic, experiential, and/or professional qualifications described in CEC § 94920 to perform the duties of this position. This certification is **only valid** when the individual holder is employed with an approved California private postsecondary and vocational educational institution, and when the employer maintains: (1) a certified copy of educational transcripts for applicants whose qualification is based on education; (2) verification of employment history; and (3) a copy of any license or information required of administrative or instructional personnel by state agencies or licensing boards.

It is your responsibility to keep a copy of your certification for your records.

If you have any questions regarding your certification, please contact the Certificates of Authorization Unit at (916) 445-3427.

Nicole L. Hammack, Office Technician
Certificates of Authorization Unit
Bureau for Private Postsecondary and Vocational Education

DIRECTOR OF STAFF
DEVELOPMENT/INSTRUCTOR

TYPE OR PRINT
See Reverse Side for Qualifications

Facility Name and Address:

Phone (415) 487-3240

ARRIBA JUNTOS
1850 Mission Street
San Francisco, CA. 94103

County San Francisco

APR 26 2002

TYPE OF REQUEST:

- ☐ New: requesting approval for first time as DSD/INSTRUCTOR
☐ Requesting approval for change of facility/school/agency (enclose copy of previous approval, HS 279)

The Department shall be notified within 30 days following employment of a new DSD/Instructor.

Submit a resume with each type of request.

DSD Cert # 1931

Issued 01/21/04

Name of DSD/Instructor Judeann Delphia ☒ RN ☐ LVN California License Number 296036

Signature Judeann Delphia RN Date of Expiration 01/21/04

Title: DSD Instructor ☒ Hours Employed 10+ Week/ 40+ Month

Date Employed as DSD/INSTRUCTOR

Facility Licensed Bed Capacity (if applicable) Date Submitted

Name of Facility, School, Agency Arriba Juntos Phone (415 .)

Address 1850 Mission Street City San Francisco ZIP 94103

County San Francisco Provider Identification Training Number SO 545

Administrator Dalila Ahumada/ Deputy Director Signature Dalila Ahumada

Director of Nursing R.N. Signature

TYPE OF TRAINING TO BE OFFERED:

- ☐ Orientation and Inservice training programs only
☒ Certification training program only
☐ Orientation, Inservice, and Certification training programs
☐ Equivalency only (provided by accredited RN, LVN, PSYCH. TECH. schools)

7/16/02 Approved
C. R. Mack RN

Attachment: B

Resume

JUDEANN DELPHIA, RN

1036 Gilman Avenue
San Francisco, CA 94124
(415) 822-2520

SUMMARY OF QUALIFICATIONS

- Assisted clients in understanding and optimizing available community resources.
- Worked in conjunction with their primary physicians to maxim their health potential. Provided live-in support for end state AIDS patients.
- Experienced in creating and administrating programs, research, insurance billing, chart audits, utilization review and implementation of multi-system software.
- Worked on the Thai-Cambodia border as member of a multi-faceted health care team. Primary responsibilities included patient assessment and intervention, education in the areas of nutrition, infection control, safe water practice and CDC research.

RELEVANT SKILLS AND EXPERIENCE

Bayview Hunter's Point Adult Day Health Care Nursing Supervisor, D.S.D. 1999 - Present

- Supervised and coordinated activities of nursing personnel in community health agency.
- Served as liaison between staff and administrative personnel.
- Developed standards and procedures for providing nursing care and for evaluating service.
- Evaluated performance of personnel and interprets nursing standards to staff, advisory boards, nursing committees and community groups.

Homemaker Upjohn Kimberly/Olsten Home Care 1998

- Worked in a variety of settings with a comprehensive home-care team.
- Experienced included assessment, resource referrals, development and implementation of problem oriented care and case communication.
- Extensive experience with DRG charting.

Arriba Juntos Educational Center Clinical Educator 1995

- Clinical educator for students in a three-month program.
- Responsible for all aspects of training including evaluation, testing and disciplinary actions.

Quantum Health Resources Nursing Supervisor 1994 - 1995

- Responsible for ongoing staff education, evaluation and patient care policies.
- Provided a caseload and on-call rotations.

UCSF-HISD System Analyst 1993 - 1994

- Designed and implemented multi-departmental procedures, forms, and training plan for the UCSF information systems integration.

- Responsible for the on-going training of more than 200 employees during system's implementation.

UCSF-Mount Zion Radiology-Cardiology Skilled Nurse Facility 1983 - 1994

- Administered of all types of infusions including chemotherapeutics.
- Patient care and teaching as related to the infusion therapy.
- Extensive experience as a per-diem in a variety of long-term settings.
- Worked as a technologist with Vascular Surgery Department, involved in patient assessments, diagnostic studies and teaching.

Independent Home Care Case Manager/Consultant 1985 - 1991

- Worked directly with patients and physicians planning.
- Implemented, supervised and evaluated individual patient care.
- Patient population primarily ARC, cardiac rehab, geriatrics.

Mount Zion Medical Center Nurse Analyst 1987 - 1988

- Wrote and maintained individual patient care plans (PC based)
- Responsible for IBAX Radiology software install.
- Trained personnel in system based quality assurance documentation, in addition to clinical care of patients undergoing invasive diagnostics.

University of Kansas Pediatric Research Center 1976 - 1978

- Care and management of pediatric hem-one patients.
- Worked with pediatric rehabilitation patients in both acute and recovery settings.

Good Samaritan Nursing Home Charge Nurse 1973 - 1976

- Worked summers and weekends as a student nurse during three years of Registered Nurse training.
- Charge nurse on night shift of 24-bed facility.

EDUCATIONAL EXPERIENCE

Wesley School of Nursing	Diploma in Nursing	1973 - 1975
Wichita Kansas	Course of Study-Geriatrics	1975 - 1976
Wesleyan College	BA - General Studies	1974 - 1977
Wichita Kansas	Medical Anthropology	1980 - 1982
WSU Extension (CC)	Comparative Religions/Cultures	1990 - 1992
Tulane University Extension	Major Behavioral Studies	1977 - 1978
The Center for Holistic Studies	Behavioral Psychology	1983 - 1985
	Grief Process Dynamics	1988 - 1990

Attachment: C

Employees Minimum Qualifications Skill Set

Employee Minimum Qualifications Skills Sets

Experience:

as a minimum one of the following:

Completion of a home care provider training course

One year previous home care experience

Training or experience in relevant coursework

Skills or Abilities:

Knowledge and ability to assist with activities of daily living

Knowledge and ability to perform basic domestic household tasks

Ability to find their way in San Francisco with minimal assistance

Must be personable, respectful and reliable

Proficient in english, bilingual skills (in any language) a plus

Essential Abilities

Due to the demands of the job all home care attendants must be able to:

Lift up to 25 lbs.

Carry at least 15 lbs. Up one flight of stairs

Walk up and down two flights of stairs

Bend forward, backward and twist right and left at the waist

Knee down on one or both knees

Stand for extended periods of time

Able to flex and extend all limbs in any direction

Attachment: D

Training Outline

ARRIBA JUNTOS
Skills Enhancement Training
For
Home Health Advocates, Inc
(30 hours)
Lesson Plan

DAY 1

**I. Professional Development (define roles and responsibilities of the caregiver).
2 hours**

a. Homecare Team Dynamics

i. Members & Roles Defined

1. Employee's role in planning care

ii. Chain of Command in Home Setting

1. Reporting & Problem Solving

iii. Scope of Practice within the Team

1. Understanding when to ask for help

a. Activity: Scope of Practice ____

b. Handout: Bill of Rights

2. Working with Client & family

a. Relearning Skills/Adapting Care

i. "Principles of Care" ____

b. Retraining Client/Family in Best Practices

i. "Teaching the Elderly" ____

ii. "Identifying Learning Blocks" ____

II. Employee-Employer relationship-Who's in control? 1 hour

a. Roles & Responsibilities of the Employer

i. Keep Open Channels of Communication

1. Activity: "Communication" ____

ii. Resource for Client/Employee Conflict

1. Activity: "Apologizing" ____

iii. Provide necessary data/training to meet client/employee needs

iv. Provide Clear Plans of Care & Directions

1. Activity: "Interpreting Care Plans" ____

2. Activity: "Outcome Based Adaptation of Plans of Care"

b. Developing Positive Relationships

- i. Approach to Interdisciplinary Team Care**
- ii. Empowering the Team toward Successful Outcomes**
 - 1. Activity: "Adapting Care Plans" ____**

III. Reporting back to employer (charting/reporting) 1 hour

a. Charting Guidelines

i. Written Communications

- 1. Handout: Agency Charting Policy ____**
- 2. Activity: "Charting Guidelines" ____**

**IV. Understand principles behind effective communication in the homecare team.
(2 hours)**

a. Elements to Communication

i. Non-Verbal Dynamics

- 1. Activity: "Communicating without Words" ____**

ii. Verbal Dynamics

- 1. Activity: "Therapeutic Techniques" ____**

DAY 2

V. Building and maintaining self-esteem. Demonstrate clear understanding of the IHSS policies and procedures.

2 hours

a. Understanding Yourself

b. Defining Goals & Creating Outcomes

- i. Activity: Role Playing ____**

c. Employer Support

1. Employer Policies & Procedures

- a. Handout: P/P ____**

VI. Professional Client Grooming in respect to the principals of care. 4 hours

Sample Scenario Topics: Disabilities, Relearning Needs, Referral process, chain of command, scope of practice, Bill of Rights, elder abuse, inservice education,

CONTINUAL UPDATING OF THE INTERDISCIPLINARY APPROACH TO THE CURRENT PLAN OF CARE

a. Client Care Skills:

Bathing ____ Hair Care ____ Shaving ____ Nail Care ____ Oral Care ____ Skin Care ____

DAY 3

VII. Activities of Daily Living in Relation to the principals of care.

6 hours

Sample Scenario Topics: Shopping (Making change, planning menus, redirecting confusion)

- i. Dignity & Respect**____
- ii. Independence/Client Teaching**____
- iii. Privacy & Confidentiality**____
- iv. Safety for Client & Caregiver**____
- v. Infection Control**____
- vi. Communication/Observations**____

DAY 4

VIII. Problem Solving and Conflict Resolution

2 hours

a. Analyzing Elements of Conflict

- i. Activity: "Objectivity Exercise"**____
- ii. Activity: "Apologizing Exercise"**____

IX. Stress and time management, responding to anger dealing with critical clients.

2 hours

a. Dealing With:

i. Time Management Issues

- 1. Activity: "Planning & Prioritizing Care"**____
- 2. Exercise: "Stress Factors"**____

ii. Dementia & Behavior Management Problems

- 1. Activity: "Adapting Environment to Manage Behavior"**_____

DAY 5

X. Dealing with the unexpected. What is the caregiver's "Best Practice"

(4 hours)

a. Emergencies

i. Responding to Client Change

- 1. Falls**____
- 2. Hyper/Hypoglycemia**____
- 3. Shock**____
- 4. Stroke/CVA**____

5. Heart Attack____

6. Aggression

XI. Creating Success (And giving 110% and expecting nothing)
2 hours

a. Maximizing Client Control

i. Activity: "Acceptance Over Expectations" ____

Diplomas/Certificates

Evaluations: Self____Course____Grades____

Home Health Pot Luck Exercise_____

Attachment: E

Job Skills Description

Home Health Advocates, Inc.

Position Description: Home Care Attendant

Housekeeping:

- Maintain cleanliness and order in the home.
- Wash dishes; clean refrigerator, clean kitchen counters, stove top and oven.
- Sweep, vacuum, dust and do routine laundry.
- Empty trash *daily*
- Mop floors once a week, and more often if needed.

Menu Planning and Cooking:

- Every week, plan balanced, nutritious and appealing for the client from the menu guides.
- Write a grocery list *for the week* based on the planned menus.
- Order the groceries by calling Home Health Advocates and reading your list to the person assigned to take grocery orders.
- **When placing your order, be sure to give brand names and quantity. Never over order or waste**

Personal Care:

- Spend caring time with the client and get to know him/her.
Caring time includes: talking with the client on subjects that you know he/she finds interesting; reading aloud from newspapers, magazines, or books and discussing what you read; watching pleasant program together; talk walks and going on outing, as appropriate.
- Continually be aware of what time of the day the client needs more personal attention and social activities.
- Bathe the client (sponge or shower) and provide personal grooming. (e.g., hair, finger and toe nails).

Charting Daily Care:

- At least every two hours each day, chart everything you do for the client. Also chart how the client reacts to what you do.
(use the Daily Chart form).

Chart activities such as:

- Topics of conversation.

- Specific activities (e.g., stories, articles read, music enjoyed, TV programs watched, handiwork crafted)
- Specific outing and the client's reaction to them.
- It is important for you to call Home Health Advocates promptly if the client's care is changed in any way.

Errands:

- Run necessary errands for the client.
When ever the health of the client and safety conditions permit, take the client with you. If the client is unable to go with you, and the errand is urgent, (it **can not** be delayed) call the office first.

Important

1. *Before going on any errand, call the office first*
2. *Call the agency again as soon as you return.*
3. *Never go on a personal errand. This could lead to immediate dismissal.*

Medical Care:

- Assist the client with medications **only** as directed by the client's doctor or health-care professionals.
- Chart on the client's Medication Record any medication the client has taken.
- If the client refuses medication, creatively try another approach. If the client still refuses, note "R" in the appropriate block on the Medication Record form. Also record this behavior on the daily chart
- If the medication is of great importance notify the office of the client's refusal
- Notify the agency of all health-care appointments.
(if previously arranged appointments for services such as grocery delivery, housecleaning, and haircutting conflict with a health-care appointment, be sure to notify the office and have the office decide what appointment will be rescheduled.
- Accompany the client to all health-care appointments, Call the office right before you leave for the appointment; call the office again when you return to the clients home.
- Each time you accompany the client to a health-care appointment, take a "**Doctor's Orders**" form with you. Be sure to have the doctor or nurse write down all instructions.
- Also be sure the doctor or nurse adds his/her signature at the end of the instructions. Place your initials after the doctor's or nurse's signature.

Attachment: F

Assessment Tool

Assessment tool to assess trainees' skills attainment

The trainee's will be assessed for their skills attainment and knowledge growth during the course.

Assessment tools and processes are in the process of being finalized by program staff, instructor and Home Health Advocates, Inc. management.

The Assessment tool will be provided within one week of this application.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**DRAFT MINUTES OF THE
APRIL 21, 2004 MEETING OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

The meeting was held in the Auditorium of Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

William Allen, Steve Arcelona, Nathan Nayman, and Stan Warren

DOCUMENTS DEPT.

ABSENT:

Kathye Citron, Theresa Feeley, John Poremba, and Ave Seltsam

JUN 21 2004

SAN FRANCISCO
PUBLIC LIBRARY

WISF STAFF:

Alice Chiu, Cathy de Cristofaro, Sean Hallisey, Lucia Hughes, and Robert Schwab

PUBLIC (AS EVIDENCED BY SIGN-IN SHEET):

Alex Saldarriaga

The meeting was convened at 12:20 P.M. The Employer Services Committee did not establish a quorum.

Chair Nayman asked that public testimony on agenda items be taken at the time of the presentation of the item.

Items 4– Customized Training Proposal

Robert Schwab gave a brief overview of the recommended proposal for Home Health Advocates, Inc. He noted that, as identified at the Board meeting, home health aides are in demand. The Home Health Advocates, Inc. selected Arriba Juntos as its training provider.

The Committee asked Alex Saldarriaga, the founder of Home Health Advocates, questions regarding his experience with the customized training process and his proposal.

Mr. Saldarriaga gave a brief overview of his background in the healthcare industry. He founded the organization in October 2003 and was a nurse prior to that. One of the main reasons he started his own health care company was to improve the quality of care being delivered to the patients. In the proposal, the trainees will receive bonuses after completion of the training. He noted that he chose Arriba Juntos as its training provider due to its superior graduates. He acknowledged Lucia Hughes for her assistance in applying for the customized training program and other employer information (i.e. tax credits). He suggested that the Committee work with Renaissance for Success to market the customized training program.

Chair Nayman reiterated that the intent of the program was to increase the amount of people working with reasonable salaries and career advancement.

The Committee thanked Mr. Saldarriaga for taking the time to address the Committee and encouraged him to return after the completion of the program to inform the Committee of its success.

Public Testimony on Non Agenda Items

Cathy De Cristofaro shared that at the last California Workforce Association conference, there were information about case studies by area. She added that she would like to connect One Stop with businesses, introducing the upcoming Bay Area Regional One Stop event.

Future Agenda Items

At the next meeting, the Committee will discuss the following: marketing report, Spring 2005 Employer Forum, updates of completed customized training programs, and evaluation criteria for the those programs.

The Committees adjourned at 12:52 P.M.

All written materials distributed at the meeting are posted on the Private Industry Council's website, www.picsf.org, and incorporated by reference herein.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
EMPLOYER SERVICES COMMITTEE (ESC)**

Date: Wednesday, May 26, 2004
Time: 10:00 a.m. – Noon
Location: Auditorium
Community College District Office
33 Gough Street
San Francisco, CA 94103

DOCUMENTS DEPT.

MAY 21 2004

SAN FRANCISCO
PUBLIC LIBRARY

AGENDA APPEARS ON THE REVERSE SIDE

**KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)**

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at www.ci.sf.ca.us/infoctr/sunshine/index.htm

OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Issued: May 19, 2004

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**Proposed Agenda
Employer Services Committee
Wednesday, May 26, 2004**

Agenda Item	Presenter	Time
1. Adoption of the Agenda (<i>Action Item</i>)	Nathan Nayman	2 min
2. Adoption of Minutes from the meeting held on April 21, 2004 (<i>Action Item</i>)*	Nathan Nayman	2 min
3. Public Testimony of Agenda Items (<i>Discussion Item</i>)	Nathan Nayman	5 min
4. Customized Training Proposal Review (<i>Action Item</i>) Jewish Family and Children Services to Operate a Training Course for Home Health Aide I and Home Health Aide II	Robert Schwab	20 min
5. Customized Training Evaluation Report (<i>Discussion Item</i>) Hotel Labor Management and Education Funds Project (first project)	Robert Schwab	15 min
6. Customized Training Marketing Report (<i>Discussion Item</i>)	Robert Schwab	10 min
7. Public Testimony on Non-Agenda Items (<i>Discussion Item</i>)	Nathan Nayman	5 min
8. New Business (<i>Discussion Item</i>)	Nathan Nayman	10 min
9. Adjournment (<i>Action Item</i>)	Nathan Nayman	5 min

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE
MEMBERS

DATE: MAY 25, 2004

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: RECOMMENDATION TO REVIEW JEWISH FAMILY AND CHILDREN SERVICES' CUSTOMIZED TRAINING PROPOSAL TO OPERATE A SKILLS ENHANCEMENT TRAINING PROJECT FOR HOME HEALTH AIDES (ITEM #4)

Action Requested

The Committee is asked to approve the funding in the amount of **\$18,000** for Jewish Family and Children's Services (JFCS) to operate an in-house customized training program. The total cost of the training is proposed at \$36,000. JFCS will match WIA Customized Training Funds in the amount of no less than \$18,000 to train 70 participants in advanced Home Health Aide skills.

Background

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost.

On May 5, 2004 JFCS submitted a proposal to PIC for funding of a Customized Training project.

Based on staff's review of the proposal, the Program intends to train 70 individuals. Of the 70 individuals, 50 are new hires and will be trained as Home Health Aides I, earning \$9.25 per hour prior to the training. Another 20 individuals are existing Home Health Aides I who earn \$9.75 to \$10 per hour. The Program is designed to teach participants the advanced skills necessary to work successfully as Home Health Aides I and II. Participants' skills will be enhanced to increase marketability resulting in an increase in wages. Participants will also be more aware of issues that this occupation typically faces and acquire the knowledge to deal with them appropriately. After successful completion of the training program, the new hires will be advanced to

Home Health Aide I with wage increase to \$10.00 per hour, and the existing Home Health Aide I will be advanced to Home Health Aide II with a wage increase to \$10.50 per hour.

Ten participants will be trained at a time; each participants training is 10 hours long. The employer expressed good faith efforts in advancing individuals upon successful completion of the training. Advancement takes the form of wage increases. As a result of the above observations, staff believes that the proposal meets all the requirements outlined in the Customized Training policy.

Recommendation

Staff recommends that the Employer Services Committee approve the requested **\$18,000** funding for this Customized Training project.

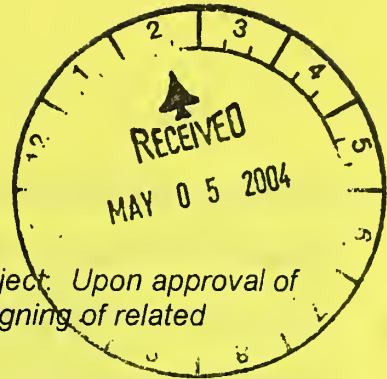
If you have any questions prior to the meeting, please contact Robert Schwab at 431-8700.



PRIVATE INDUSTRY COUNCIL
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CUSTOMIZED TRAINING PROPOSAL



This document is to serve as a proposal for a Customized Training Project. Upon approval of this proposal by the Workforce Investment San Francisco Board and signing of related contracts, the form and content of this proposal shall become final.

I. EMPLOYER INFORMATION (To be completed by Employer):

Company: Jewish Family and Children's Services (JFCS) Telephone #: 415-449-3700
Program Name: Seniors At Home
Address: 2150 Post Street Training Site Address (If Different):
San Francisco, CA 94115
Name & Title of Contact Person: Amy Rassen, Associate Executive Director
Individual(s) Authorized to Sign Invoices: Amy Rassen, Mickey Sherman
Number of full-time employees: 146 full-time, 187 part-time Incorporated: YES [X] NO []

II. TRAINING PROVIDER INFORMATION (To be completed by Training Provider):

Organization: JFCS Telephone #: 415-449-3700
Address: 2245 Post Street, San Francisco, CA 94115
Name & Title of Contact Person: Amy Rassen, Associate Executive Director
Federal Employer Identification Number: 94-115-6528
State Identification Number: 0-0050025 California Tax ID: 910-1477 9
Workers' Compensation Policy Carrier: Argonaut
Workers' Compensation Policy No.: WC-63-665-212202 Expiration Date: 12/1/04
PIC's Eligible Training Provider Lists (ETPL) Number (if applicable) _____

III. CONTRACTOR INFORMATION:

Private Industry Council of San Francisco, Inc.

1650 Mission Street, Ste. 300
San Francisco, CA 94103-2490
415.431.8700

745 Franklin Street, Ste. 200
San Francisco, CA 94102-3228
415.923.4003

Name & Title of Contact Person: Robert Schwab, V.P. Business Services

IV. INSTRUCTOR'S QUALIFICATION (To be completed by Training Provider):

Name & Title of Instructor: Helen Jaffe, RN

Years of Relevant Experience: 23

Does he/she have a teaching certificate or other credential (if yes, please attach a copy)? See Exhibit A

References: Please attach at least two clients for which comparable training was performed by you.

V. TRAINING PROGRAM DATA (To be completed by Employer and Training Provider): (use an attached sheet is necessary)

A	B	C	D	E	F
Trainee Name (For Current Employee)	Participant(s) Job Title (For Current Employee)	Start Date	End Date	Pre-Training Wage	Post Training Title
Recruitment in Process New Hires (50)	Home Care Aide I	July 1, 2004	June 30, 2005	9.25	Home Care Aide I
Recruitment in Process Home Care Aide I (20)	Home Care Aide II	July 1, 2004	June 30, 2005	9.75	Home Care Aide II

(a) Recruitment:

Do you need help in the recruitment of trainees? No
If so, how many trainees do you need to recruit?

(b) Qualification:

Do you have an employee minimum qualification skill set? This would be a set of expected employee skills such as literacy and fluency in English, appropriate grooming skills, and the like.

X Yes (please attach)

Would you like PIC to provide one for you?

X No

VI. TRAINING COST (To be completed by Training Provider):

	Cost
A. INSTRUCTIONAL COST	15,000
B. TRAINING MATERIALS	14,000
C. TRAINING FEES	7,000
TOTAL	36,000
EMPLOYER CONTRIBUTION (1/2 OF TOTAL)	18,000

VII. METHOD OF PAYMENT (To be completed by Contractor):

The payments from the Employer shall be made to the PIC in two equal installments; \$_____ upon signing of the Contract and \$_____ upon completion of services as outlined in the Contract, or as soon as practicable subject to the receipt of funds. The disbursement of the final payment is subject to the performance standard detailed in **Section IX**.

The payments to the Training Provider shall be made to the PIC in two equal installments; \$_____ upon signing of the Contract and \$_____ upon completion of services as outlined in the Contract, or as soon as practicable subject to the receipt of funds and a properly prepared invoice. The disbursement of the final payment is subject to the performance standard detailed in **Section IX**.

VIII. ORGANIZED LABOR CONCURRENCE: (If under collective bargaining agreement, to be completed by Employer)

Concurrence Given By: _____
NAME OF UNION REPRESENTATIVE

Title: _____ Date: _____

IX. TRAINING OUTLINE (to be completed by Employer and Training Provider)

OES JOB TITLE: _____ OES #: _____
[If you do not know the OES data, leave blank and we will fill it in for you]

EMPLOYER'S TITLE FOR THIS JOB: Home Health Care Aide I and II

To Be Completed By the Training Provider

Include a detailed outline of training to be provided, tasks to be learned, and approximate hours of training required for each task. (Use an attached sheet if necessary.)

See the attached Training Manual, Exhibit B

Successful participants will receive certifications of completion.

To Be Completed By the Employer

Provide a thorough description of the job skills for which training is being requested. (Use an attached sheet if necessary.)

See the attached Job Descriptions, Exhibit C

To Be Completed By the Employer

(1) How would you define successful completion of training program? Please be specific, as this definition will be used to evaluate success of training program and the participants' suitability for post training placement/ advancement. (Use an attached sheet if necessary.)

(2) Do you have an assessment tool to assess trainee's skills attainment? ☒ Yes
No

See Assessment Tools within the Training Manual, Exhibit A

(3) Please detail the number and type of positions that you plan to open, or the number of employees and type of positions that you plan to advance upon successful completion of the training. (Use an attached sheet if necessary.)

We expect to open 50 Home Care Aide I positions and to advance 20 employees to Home Care Aide II positions.

505 Hurlingham Avenue
San Mateo, CA 94402
Phone (650) 342-6977

Helen Jaffe

Education

State of California Clear Designated Subjects Adult Education
Teaching Credential: Part Time Home Health Aid, Expires June
2006

Masters in Science and Nursing (Community Health Nursing);
Gerontology Nurse Specialist, San Jose State University,
California, 1984

Bachelors in Science in Nursing, University of Cincinnati, Ohio, 1960

Professional experience

1991 to present, Nurse Educator, Jewish Family and Children's
Services, San Francisco, California

- Plans, develops and implements the clinical education
component for all staff of JFCS' homecare division.
- Supervised homecare attendants, recruitment of workers, and
assessment of clients.

1991 to present, San Mateo High School, San Mateo, California

- Plans, develops and implements an entry level homecare
attendant training program

1981 to 1991, Program Director, Jewish Family and Children's
Services

- Initiated and provided oversight to Peninsula-based homecare
program to serve the elderly

Accreditations

Registered Nurse License: California, Florida, Ohio
Public Health Nurse License: California
Certified Gerontology Nurse Specialist

Seniors•At•Home Home Care, a division of Jewish Family and Children's Services
2245 Post Street
San Francisco, CA 94115

CONTRACT JOB DESCRIPTION

Job Title: Home Care Aide I

Reports to: Director of Patient Care Services

Qualifications:

1. A minimum of two years experience providing homecare and companionship services to adults and/or seniors.
2. Ability to read and follow instructions, communicates clearly, and writes legibly. .
3. A minimum of 3 satisfactory work references.
4. Self-directing with the ability to work independently.
5. Ability to work with others.
6. Patience with and empathy for the ill, injured, frail and those with disabilities.
7. Flexible and cooperative in fulfilling role obligations.
8. Practices good personal hygiene.
9. Demonstrates good observational skills and sound judgement.
10. Satisfactory report of pre-employment physical.
11. Legal documentation for work.

Summary of Job Responsibilities:

The Home Care Aide I assists adults and families with daily housekeeping maintenance and tasks, companionship, shopping and errands. Duties are primarily housekeeping and companion oriented, providing assistance and supervision with activities as appropriate.

Responsibilities and Duties:

Responsibilities of the Home Care Aide I include, but are not limited to, the following:

1. Plan and prepare well-balanced and nutritious meals for a regular diet, with sensitivity to client preferences.
2. Accompany client to appointments/ errands using public transportation service or taxis or automobile.
3. Light housekeeping of client environment, to preserve a safe, hygienic home including vacuuming, dusting, cleaning bathroom and kitchen.
4. Do laundry.
5. Observe and monitor client condition; notify agency staff of any significant changes in client status and make daily log entries as appropriate.
6. Shop for groceries.
7. Teach and cue to activities that increase/sustain client independence within the scope of HCA-I and Agency policy.
8. Complete time sheets as required.
9. Attend initial orientation and yearly training, as required.

10. Complies with the Client Plan of Care.
11. Complies with all Agency's Policies and Procedures in accordance with the Homecare Attendant Handbook.
12. Other tasks assigned.

Job Limitation:

The Home Care Aide I will not function beyond the limits of the Home Care Aide I job description. The Home Care Aide I will provide homemaking services, assistance and supervision but will not provide any personal care. The Home Care Aide I will not perform any duties where there is any concern for client safety, worker safety, or environmental safety.

Working Conditions:

1. Community and home (client residence) environment.
2. Exposure to infectious diseases.
3. In an out of automobile or public transportation, if applicable.

Continuing Education Requirements:

The Home Care Aide I is expected to participate in appropriate trainings as requested and/ or required by the Agency.

Seniors•At•Home is an equal opportunity employer. The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified. This is an exempt, contract position.

Reviewed 4/16/04

Seniors•At•Home Home Care, a division of Jewish Family and Children's Services
2245 Post Street
San Francisco, CA 94115

CONTRACT JOB DESCRIPTION

Job Title: Home Care Aide II

Reports to: Director of Patient Care Services

Qualifications:

1. A minimum of 2 years experience in providing personal care and homemaking services to adults and/or seniors.
2. Ability to read and follow instructions, communicates clearly, and writes legibly.
3. A minimum of 3 satisfactory work references.
4. Self-directing with the ability to work independently.
5. Ability to work well with others.
6. Patience with and empathy for the ill, injured, frail and those with disabilities.
7. Flexible and cooperative in fulfilling role obligations.
8. Practices good personal hygiene.
9. Demonstrates good observational skills and sound judgement.
10. Satisfactory report of pre-employment physical.
11. Complies with legal documentation for work.

Summary of Job Responsibilities:

The Home Care Aide II provides the client with personal care and home management activities. The duties include supportive services and personal care provided in accordance with the Client Plan of Care.

Responsibilities and Duties:

Responsibilities of the Home Care Aide II include, but are not limited to, the following:

1. Assistance with personal care, including: bathing, dressing, providing hair care, oral care and toileting.
2. Monitor skin integrity.
3. Take and record vital signs.
4. Meal planning and preparation of special diets, as needed.
5. Assistance with eating.
6. Observing/reporting intake of foods and fluids and frequency of elimination.
7. Observing/reminding to take medication.
8. Assistance with ambulation and transferring, all levels to all surfaces.
9. Light housekeeping of client environment, to preserve a safe, hygienic home.
10. Launder client clothes and other articles.
11. Grocery shopping.
12. Accompany client to appointments/errands using public transportation services or taxis or automobile.

13. Teach and cue to activities that increase/sustain client independence within the scope of HCA II.
14. Appropriate client teaching within scope of HCAII and Agency policy.
15. Observe and monitor client condition, notify Agency staff of any significant change in client status and make daily log entries as appropriate.
16. Complete time sheets as required.
17. Attend initial orientation and yearly training, as required.
18. Comply with the Client Plan of Care.
19. Comply with all Agency's Policies and Procedures in accordance with the Homecare Attendant Handbook.
20. Other tasks assigned.

Job Limitation:

The Home Care Aide II will not function in any manner beyond the limits of the Home Care Aide II job description. The Home Care Aide II will not perform any duties where there is any concern for client safety, worker safety, or environmental safety.

Working Conditions:

1. Community and home (client residence) environment.
2. Exposure to infectious diseases.
3. In an out of automobile or public transportation, if applicable.

Continuing Education Requirements:

The Home Care Aide II is expected to participate in appropriate trainings as requested and/ or required by the Agency.

Seniors•At•Home is an equal opportunity employer. The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified. This is an exempt contract position.

Reviewed 4/30/04

Seniors • At • Home

***a division of Jewish Family and Children's Services
of San Francisco, the Peninsula, Marin and Sonoma Counties***

Homecare Orientation

2245 Post Street

San Francisco, CA 94115

(415) 449-3700



TABLE OF CONTENTS

I. WELCOME TO ORIENTATION.....	7
II. BODY MECHANICS AND TRANSFERS.....	8
TEN COMMANDMENTS OF BODY MECHANICS.....	9
BODY MECHANICS: STEP AND SEQUENCE FOR TRANSFERS	10
THE ESSENTIALS OF A CORRECT TRANSFER.....	11
ERGONOMIC SAFETY.....	12
III. UNIVERSAL/STANDARD PRECAUTIONS; INFECTION CONTROL.....	14
TUBERCULOSIS (TB).....	14
INFECTION CONTROL	16
HAND WASHING	16
IN THE HOME	17
TUBERCULOSIS	20
HEPATITIS B	22
HEPATITIS B IMMUNIZATION PROGRAM	24
IV. ENVIRONMENTAL SAFETY.....	26
EMERGENCY PREPAREDNESS PLAN.....	27
V. HOME SAFETY.....	29
ENVIRONMENTAL SAFETY	29
FIRE SAFETY	31
UTILITIES	32
MEDICAL EQUIPMENT.....	33
EMERGENCY INSTRUCTIONS	34
IMPORTANT PHONE NUMBERS	35
VI. ELDER ABUSE.....	36
INDICATIONS AND EXAMPLES OF ABUSE.....	37
STATEMENT OF UNDERSTANDING AND INTENTION TO COMPLY WITH CHILD, ELDER, AND DEPENDENT ADULT ABUSE REPORTING REQUIREMENTS	38
INCIDENT REPORTING	39
VII. CLIENTS WITH SPECIAL NEEDS.....	41
ALZHEIMER'S DISEASE	41
CHALLENGING SITUATIONS	43
PARKINSON'S DISEASE	44
STROKE (CVA: CEBROVASCULAR ACCIDENT)	46
HIV AND AIDS	48
HOSPICE AND PALLIATIVE CARE OF JFCS	50
VIII. COMMUNICATION.....	51
ABOUT COMMUNICATION	52
<i>What is Communication?</i>	52

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2245 Post Street • San Francisco • California 94115

<i>When Do We Communicate?</i>	52
<i>How Do We Communicate?</i>	52
<i>Elements Needed to Communicate</i>	52
<i>When Does Communication Break Down?</i>	52
COMMUNICATING, OBSERVING, REPORTING, AND DOCUMENTING	53
COMMUNICATION TECHNIQUES	56
<i>IX. TAKING CARE OF YOURSELF</i>	57
<i>X. WORKING WITH SURVIVORS OF THE HOLOCAUST/NAZI PERSECUTION</i>	58
WHAT IS ANTI-SEMITISM?	58
WHAT WAS THE HOLOCAUST?	58
WHO IS A SURVIVOR?	58
HOW CAN I IDENTIFY A HOLOCAUST SURVIVOR?.....	58
HOW CAN THE WORDS WE USE IMPACT CLIENTS?	59
WHY MIGHT SURVIVORS OF THE HOLOCAUST/NAZI PERSECUTION ACT DIFFERENTLY THAN OTHER CLIENTS?	59
TRIGGERS, REASONS AND INTERVENTIONS.....	59

Seniors•At•Home Homecare
2245 Post Street • San Francisco • California 94115

Orientation Evaluation:

Please fill out this section and return to instructor.

Name (Print): _____

Date: _____ Instructor: _____

Rank: 3 Acceptable
 2 Acceptable with Correction
 1 Unacceptable

	Score	Comments
Gloves		
Body Mechanics & Transfers		
Comprehension		
Attitude		

LEVEL: HCA1 HCA11 HCA111

Seniors•At•Home Homecare
2245 Post Street • San Francisco • California 94115

Orientation Verification Record

Employee: Fill out this Section Only and return to instructor

Name (print): _____

Date: _____

I have received training/instruction in the subjects listed on the Verification Record and have had the opportunity to ask questions. I understand that I am responsible for complying with the instruction I have received on the topics on the verification record and agree to follow all Agency Safety and Health Rules, Policies, and Procedures.

Signature: _____

Date: _____

SENIORS•AT•HOME

I.

Universal Precautions

Infection Control

Infectious Waste Management

Exposure Control Plan

Availability, Use and Selection of Personal Protection

Blood Borne Pathogen

Cause, Symptoms, Effects of HIV, HBV, & TB

HBV Immunization

Exposure: Post Exposure Procedures

Emergencies

Evaluation and Follow Up

Transmission & Prevalence of HIB, HBV,

TB Infection

Equipment

II. TB Prevention and Practices

III. Emergency Preparation/Safety Program; Environmental Safety

IV. Body Mechanics; Transfer

V. Agency Policy and Expectations: Incident Reporting, Complaint Grievance, Non-Discrimination Policy, Personal Safety

VI. Confidentiality

VII. Basic Needs

VIII. Overview of Aging

IX. Overview of Health Related Problems and Disabilities: Dementia, Alzheimer's Disease, Parkinson, HIV/AIDS Hospice

X. Communications, Observing, Reporting, Documenting

XI. Housekeeping Guidelines

XII. Elder Abuse and Neglect

I, the above person, have been trained/instructed on all of the topics on this Verification Record.

Name, Signature and Title

Date

Seniors•At•Home Homecare
2245 Post Street • San Francisco • California 94115

NAME: _____

DATE: _____

Orientation Training Pre-Test. This will be reviewed in class.

The following are True/False statements. Please put a T or F next to each statement.

1. ___ Basic Human Needs are the cleaning and personal care products the clients should have in their homes.
2. ___ As people age, they gradually lose their ability to learn.
3. ___ Progressive confusion and lack of judgment are normal signs of aging.
4. ___ The temperature on the heating pad should be set not higher than “medium” when left on overnight.
5. ___ Feedback is an essential component of effective communication.
6. ___ People who have a stroke always have a problem speaking.
7. ___ Parkinson’s Disease is associated with tremors and problems with posture, balance, and walking.
8. ___ We should bend at the waste to pick up and/or move an object.
9. ___ You should try to change the behavior of someone with Alzheimer’s disease by being rigid, firm, and persistent.
10. ___ Loose carpets, inadequate lighting, obstructed pathways, and faulty electricity are examples of fire and safety hazards in the home.
11. ___ Universal Precautions/Universal Standards means treating everyone’s body fluids as though they are infectious.
12. ___ Symptoms of active TB (Tuberculosis) include cough, bloody sputum, weight loss, and fever.
13. ___ Fatigue, distraction, lack of concentration, and stress are major contributions to accidents and errors.
14. ___ An unusual incident, such as a client fall or an employee injury, must be reported immediately to the Home Care Agency office.
15. ___ It is the responsibility of the Home Care Agency employee to be familiar with and have a plan for emergency preparedness in each client’s home.
16. ___ Hospice is a word that applies to the care of a terminally ill person.

I. Welcome to Orientation

During our session today, we will be discussing some of the many areas that relate to homecare! To make the best use of our time, please follow these guidelines:

- Silence all pagers and cell phones, unless you have discussed otherwise with the instructor.
- As we do not take formal breaks, if you would like to leave the room (for example to use the rest room or get a drink), please do so quietly. We ask that not more than two people leave the room at one time.
- You may eat and/or drink during the class; please be sure to pick up used items upon leaving.
- If you have parked in a parking space that has limited parking, be aware of the time so that you will be able to leave the room to move your car.
- It is up to the group as to whether or not we will break for lunch before completing the session, which usually takes about 3 hours. As it approaches lunchtime, we will decide upon this.
- The folder is yours to keep and use for future reference. Feel free to make any notations in it you wish.
- If you have any questions, would like to make a comment, or do not understand something, please to not hesitate to interrupt the instructor!

For the purpose of this orientation and the use of the manual, the words "Homecare Agency", "Seniors •At•Home" and "the Agency" are used interchangeably.

Please continue to the next page and fill out the green forms on pages 5 - 6 and do the pre-test.

II. Body Mechanics and Transfers

This important unit explores how to use your body to prevent injury, maximize strength, and conserve energy. By learning and employing correct principles, you will avoid accidents and injuries to both you and your client.

After viewing a video and reviewing the following pages, there will be a demonstration of proper body mechanics and transfers. You will be asked to demonstrate a proper transfer. There will be an evaluation of your transfer.

You will have an opportunity to ask questions.

Ten Commandments of Body Mechanics

1. When Standing for long periods of time, use a footrest to relieve sway back.

6. Lifting. Use "work" (thigh) muscles by straightening your legs.

2. Size Up Load and Get Help. If your load (equipment or material) to be lifted is more than you can handle, regardless of the weight.

7. Be Smooth and Synchronized. Avoid strain produced by jerky movements. Get together with the person helping you. (It's a good idea to count 1, 2, 3.)

3. Check Your Footing. Your feet should be apart to give you a broad base of support for better balance and stability.

8. Turn. Don't Twist. Shift the position of your feet to turn. Don't twist your body.

4. Move Close. Instead of reaching from a distance, move in and hold the object close to your center of gravity (concentrate the mass in your pelvic area).

9. Don't Lift when you can pull or push the object. It's safer and easier that way.

5. Squat. Don't use "mobility" (back) muscles. Bend your hips and knees and keep your back straight.

10. Teach and Preach what you have learned to others so all of us will lift well and safely.

Body Mechanics: Step and Sequence for Transfers

Ask yourself these questions and follow the procedure.

1. Am I ready?

Do I know what I am going to move?

- Do I know its size, shape and weight?
- Do I know how the weight is distributed?
- Do I know how much and where support is needed?

Do I know how I am going to move the object or client?

- Will I push, lift, lift, or slide?
- Am I knowledgeable and experienced?
- How much weight can I support?
- Do I need assistance? Is assistance available?

Do I know about the client?

- Physiological condition: circulation, balance, pain, dizzy, area of involvement
- Emotional factors: Fear, trust...
- Mobility
- Comprehension
- Motivation

Do I know when?

- Is everyone ready?
- Is it convenient for the client?
- Is there sufficient time?

2. Is the client ready?

- Does the client understand?
- Is it convenient for the client?
- Is the client anxious?

3. Is the equipment ready?

- Do I know how to operate the equipment?
- Is the equipment ready and available for use?
- Is the equipment operable and safe?
- Is the equipment in the proper place?

4. Wash your hands!

After all the preparation is completed, you are ready to begin the transfer.

The Essentials of a Correct Transfer

1. Wash your hands.
2. Provide privacy for the client.
3. Introduce yourself and explain what you are going to do.
4. Use a transfer/gait belt if indicated.
5. Determine if the client has one side stronger than the other. If possible, transfer to the stronger side.
6. Ask the client to move forward in the chair; assist if necessary.
7. Be sure the client is wearing well fitting, non-skid shoes.
8. Check that the client's feet are apart, flat on the floor, and slightly behind her/him.
9. Place you legs between the client's legs.
 - If you are transferring to the right, your left leg is between the client's legs.
 - If you are transferring to the left, your right leg is between the client's legs.
 - If the client has a weak leg/knee/side, be prepared to support that area with your knee.
 - One of your feet should be facing the client; the other in the direction that you are going.
10. If you are assuming most of the transfer, your face should be facing the direction that you are going so that you have a clear vision of where you will be. If the client is assuming most of the transfer, the client should have the clear vision of where to go.
11. Move close to the client; with each hand, reach around and behind the client's waist and take a hold of the belt.
12. Plant your feet firmly on the floor, bend at the waist, and tell the client to rock three times gently (or rock the client) so that at the count of "three" the client's body is forward - "Nose over Toes."
13. At the count of "three", transfer the client to the other surface.
14. If the client is assuming most of the work, as in a stand by or minimum transfer:
 - Assess the client; assist if necessary.
 - It may be preferred that the client push down on the arms of the chair.
 - You still proceed with step 1 through step 8, and instruct the client to rock three times so that his/her body is moving forward when it is time to stand - "Nose over Toes."
 - Instruct and guide the client to the chair and tell the client that he/she should be able to feel the chair against the back of his/her knees before attempting to sit.
 - The client should be reminded to bend the knees and lean slightly forward - "Nose over Toes."
15. The client should do as much of the transfer that is safe and possible.
16. Wash your hands.
17. Report and document any unusual or unexpected circumstances to the office.

Ergonomic Safety

What is ergonomic safety?

- Ergonomic safety is adapting equipment, procedures, and work areas to fit the person. It helps prevent injuries and improves efficiency
- The work area is every place that you work; it could be in your home, garden, recreational or hobby area in addition to your place of employment.
- Ergonomic safety is using equipment and procedures all the time, not just when there might be a problem.
- Ergonomic safety needs to be practiced. Sometimes old habits need to be changed so that it can be replaced with the new ergonomic safety habit.
- Ergonomic safety means notifying the homecare agency immediately of any incident or potential incident that is of concern to you.

Using our body incorrectly and using improper equipment and procedures can cause injuries such as:

- Strains and sprain to such frequently affected areas such as the back, fingers, ankles, and knees due to improper lifting and/or carrying techniques.
- Repetitive motion injuries most often to fingers, hands, wrists, neck, and back due to repeating one motion over and over and/or from poor posture and/or positioning.
- Eyestrain, headaches, and fatigue due to poor lighting, posture or positioning, or to noise.

At your desk:

- When you work at the computer or at the desk, be sure that the workstation is set up properly. If necessary, adjust your chair height and backrest so that your feet are flat on the floor, your knees level with your hips, and your lower back supported. Use a footrest and cushion or pillow, if necessary.
- Sit at least an arm's length away from the computer screen. Keep wrists straight and elbows at right angles. Reduce glare by changing screen position or lighting, or by using a glare filter.
- Adjust your position, stretch, and change your pace of work regularly throughout the day.

Lifting and transferring:

- Learn and practice the principles of good body mechanics:
 1. Bend from the knees, not the waist.
 2. Stand close to the person or object.
 3. Have feet apart and planted firmly on the floor.
 4. Pivot; don't twist. Point one foot in the direction you are going.
 5. Be smooth and synchronized. When you are working with another person count "1, 2, 3." Be sure these instructions are clear and understood.
 6. When standing for a long length of time, use a footrest to relieve sway of the back.
- Plan the move. Before you begin, each time ask yourself:
 1. Am I ready?
 2. Is the client ready?
 3. Is the equipment ready?

Remember

Proper body mechanics and transfers must be practiced all the time, at home, at play, and at work.

Immediately document and report to the Homecare Agency any injury or unusual circumstances.

III. Universal/Standard Precautions; Infection Control Tuberculosis (TB)

This unit explores universal/standard precautions, infection control, and tuberculosis.

After reviewing the following pages related to infection/standard precautions, infection control and tuberculosis we will view a video. You will have an opportunity to ask questions.

You will find additional information related to this unit in the Appendix.

Proper glove technique will be demonstrated; you will be asked to give a return demonstration of proper glove technique.

Infectious diseases are a major risk to patients, visitors and staff. There are many different infectious diseases, some of which are spread through direct contact while others are spread through the air. The infectious disease that pose the greatest "risk to health care workers include:

- HIV infection
- Hepatitis (A, B, C, D, E, and G)
- Pneumonia
- Gastroenteritis (caused by salmonella, shigella, etc.)
- Staph and strep infections

Blood and certain body substances may contain disease-causing organisms. These body substances include:

- Pus, drainage from sores or wounds
- Saliva, sputum
- Secretions from mucous membranes
- Semen, vaginal secretions
- Stool (feces), urine, vomit

All body substances except sweat should be considered potentially infectious.

Know the precautions you must take if exposure to blood or other body fluids, broken skin, or mucous membranes is possible.

- ✓ Follow standard or universal precautions for all clients.
- ✓ Assume that **every** person has something that you could acquire
- ✓ Follow transmission basic precautions for any one who may have a contagious disease:
 - Airborne precautions for infectious dust particles or small particle droplets.
 - Droplet precautions for infectious large particle droplets (such as from sneezing or coughing).
 - Contact precautions (skin to skin contact or contact with a contaminated object).

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Wash your hands frequently and as required: (Waterless hand cleaner and gloves are available in the Homecare Agency Office)

- Before and after client contact
- Upon arriving and before leaving client's home
- Before, during and after food preparation
- Before eating and before serving food
- After toileting
- After touching pets/animals
- After touching contaminated items
- After touching garbage
- Before and after putting on gloves
- After touching the mouth and/or coughing and/or sneezing

Use PPE as required:

- Always wear gloves if contact with blood or other body substance is possible. .
- Wear eye and/or face protection, and protective coverings such as gowns and boots if splashing is possible
- Use surgical mask or HEPA (high-efficiency particulate air) respirator, depending upon which types of transmission-based precautions are needed.

Prevent injuries from sharps:

Only authorized Homecare Agency nurses may handle sharps.

- Dispose of used sharps promptly after use in designated containers only. Never reach inside the container.
- Dispose of used sharps containers properly, following the Homecare Agency guidelines.
- Do not recap needles. If absolutely necessary to recap, a mechanical device or the proper one-handed technique must be used.

Remember

- √ Use and remove gloves properly
- √ Clean up spills promptly using standard precautions
- √ Handle linen and laundry following standard precaution guidelines. Handle, wash, sterilize, and/or disinfect client-care equipment properly.
- √ Dispose of infectious wastes properly.

Always report any exposure incident immediately to the Homecare Agency.

Infection Control

Purpose

To provide a consistent, uniform approach to preventing the transmission of infection.

Policy

Homecare Agency employees practice Universal Blood and Body Fluid Substances Precautions for all clients.

Specific body fluids/substances include: blood, semen, vaginal secretions, tissues, cerebrospinal fluid, synovial fluid, pleural fluid, pericardial fluid, amniotic fluid, breast milk, feces, saliva, nasal secretions, sputum, sweat, tears, urine and any body fluids that contain blood.

Universal Precautions must be strictly followed whenever there is the possibility of exposure to blood or other body fluids/substances. All staff needs to exercise good judgment in making decisions about anticipating exposure and when to use appropriate barrier precautions.

Universal Precautions are guidelines that are a standardized way for health care workers to prevent the transition of disease to themselves or their clients.

Universal Precautions are used with all clients - everyone is assumed to be harboring a transmissible organism, no matter what the person's diagnosis, age, sex sexual preference, or activities

Many diseases and pathogens are transmitted through the blood and body fluids. Body fluids include, but are not limited to: sputum, urine, saliva, pus, stool (feces), and drainage of any kind.

Hand washing

Important method of infection control:

- Use liquid soap, warm, running water and friction.
- Wash for at least 10 seconds.
- Rinse well, beginning at fingertips, so dirty water runs off at wrists.
- Dry hands on paper towels.
- Use dry paper towels to turn off faucets.
- Wash immediately before and after client contact,
- If contaminated with body fluids/substances,
- Before putting on gloves or preparing or eating food
- After removing or disposing of gloves.
- There is a waterless hand washing product available if water facilities are not available in the home. Hand washing facilities should be located as soon as possible after leaving the home and hands washed with soap and water following above procedure. Waterless hand cleaner and gloves are available in the Homecare Agency Office.
- Clients should wash hands before eating and after elimination.

In the Home

General Housekeeping

- A good disinfectant is household bleach mixed 1:10 with water.
- Use 1:10 bleach solution to clean bathroom surfaces, sinks, countertops and obviously soiled furniture.
- Sponges and mops used to clean up body fluid spills should not be rinsed out in the sink or where food is prepared.
- Dirty mop water should be poured down the toilet rather than the sink.
- Keep rooms well aired to decrease the risk of colds, flu, and other airborne communicable diseases.
- Infectious organisms may be found in animal waste, birdcages, cat litter boxes, and fish tanks. They should be
- Maintained by someone other than a person with AIDS or other causes of immunosuppression. Immunosuppressed clients should also avoid exposure to sources of stagnant water such as flower vases, denture cups, irrigation solutions, respiratory equipment, and liquid soap.

Blood/Body Fluid Spills

- Spills should be mopped or wiped up with hot soapy water and then disinfected with bleach and allowed to air dry. *Disposable gloves are to be worn for the clean-up.*
- Soiled sponges and mops can be disinfected by soaking in a 1:10 bleach solution for 10 minutes.

General Hygiene

- Personal items such as toothbrushes, razors and enema equipment should not be shared.
- Maintaining a state of personal cleanliness is the key to reducing infection transmission from person to person. This includes; bathing regularly, washing hands after use of bathroom facilities or contact with one's own body fluids and before preparing food.

Laundry

- Used towels and washcloths should not be shared by different users.
- *Minimum* of gloves are to be worn when handling soiled linens.
- Linen or clothing soiled with feces, urine, or drainage should be placed in plastic bag which is tied shut until soiled items are laundered. Never place soiled linen on floor. *Contaminated laundry should be handled as little as possible.*
- Soiled clothing and linen should be washed as promptly as possible. Wash items alone and after other family laundry, especially when client has a draining wound or communicable disease.
- Machine washing (colorfast) - One cup of household bleach in hot water and laundry detergent
- Hand washing (colorfast) - Two tablespoons of household bleach in 1 gallon of warm water and laundry detergent; soak for 10 minutes and rinse.
- Machine washing (non-colorfast) - One cup of Lysol in warm water and laundry detergent. Wash again with water only to remove Lysol.

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- Hand washing (non-colorfast) - Two tablespoons of Lysol in 1 gallon of warm water and laundry detergent; rinse at least three times to remove Lysol.

Equipment/Non-Disposable Instruments

- Contents of commodes, bedpans, emesis basins and urinals should be emptied as soon as possible into the toilet
- When emptying waste into toilet, be sure to avoid splattering contents.
- Urinals, bedpans, and commode pans are cleaned using this method: Rinse with water. Scrub with liquid soap and warm water using brush. Rinse with warm water. Rinse with 1:10 bleach solution. Allow to air dry or wipe dry with paper towel.
- All cleaning solutions should be disposed in toilet. For appropriate use and disposal of protective wear, see Personal Protective Equipment section.

Thermometers

Digital thermometers with disposable sheaths must be cleaned with bleach solution or alcohol between family members.

Glass thermometers used in the home should be rinsed with soap and water before and after use. If the thermometer will be used by more than one family member, it should be soaked in 70-90% ethyl alcohol for 30 minutes followed by a rinse under a stream of water between users.

Medical Equipment

Glucometers will be cleaned by wiping with 1:10 bleach solution as necessary and at least weekly. Blood under the faceplate will cause a false reading.

Recommend small spray bottle with 1:10 bleach mixture. Solution to be changed at least monthly.

Soiled durable medical equipment in the home, such as wheelchairs, commode chairs, etc., is cleaned using this method: Wipe away any gross matter with disposable tissue and dispose of in toilet. Wash with warm soapy water. Wipe equipment with 1:10 bleach solution and allow to air dry.

See Personal Protective Equipment section for information regarding use of appropriate protective wear.

General Information

Food and drink should not be kept in refrigerators, freezers, shelves, and cabinets or on countertops or bench tops where blood or other potentially infectious materials are present.

Eating, drinking, smoking, applying cosmetics or lip balm, handling contact lenses are prohibited in work areas where there is a reasonable likelihood of exposure to body fluids/substances.

Staff who have draining lesions or weeping dermatitis are to call Director of Patient Care Services immediately. Staff will refrain from all direct client care and from handling client care

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equipment until the condition resolves; unless secretions can be contained and Director of Patient Care Services approves.

All procedures involving blood or other potentially infectious materials shall be performed in such a manner as to minimize splashing, spraying, splattering, and generation of droplets of these substances.

Client/Family Education

The Homecare Agency may instruct clients and family about any precautions relating to infection control that are appropriate to the client's care needs as outlined in this material.

Clean Technique

- Clean Technique means hands, instruments, supplies, and care methods are free from pathogens.
- Clean technique is used in all procedures not designated as sterile.
- It reduces the occurrence of infection.

Wounds

- Draining or weeping wounds are covered with appropriate dressings.
- Soiled dressings are disposed of following waste disposal guidelines above.
- Consider dressing packages non-sterile when they are unsealed or wet.

Tuberculosis

Tuberculosis is a disease caused by a bacterium called *Mycobacterium Tuberculosis*.

Who is at risk?

Anyone who has ever had contact with a person with infectious TB. Populations at high risk for TB are: HIV -infected persons, intravenous drug users, recent immigrants from countries with a high TB prevalence, correctional facility inmates, and the homeless.

What is the mode of transmission?

TB bacilli are spread from person to person by means of airborne particles, called droplet nuclei, which can be generated when persons with infectious TB sneeze, cough, speak or sing. Infection occurs when a susceptible person inhales droplet nuclei containing TB bacteria, and the bacteria become established in the lungs and then spread throughout the body.

Two to ten weeks after initial infection with droplet nuclei containing TB bacteria, the body's immune response usually limits further multiplication and spread of TB bacteria. However, in a small proportion of cases (usually <1%), initial infection rapidly progresses to clinical illness or active TB. For another group (5-10%), active TB develops after an interval of months, years or decades.

The hazard associated with TB exposure has also been exacerbated recently by the appearance of strains of TB bacilli which are resistant to the currently available antibiotics used to treat TB. These strains of TB are called "multi-drug resistant TB", or MDR-TB.

Identification of persons with TB infection and disease

The only sign exhibited by most TB-infected persons who are *not* suffering from *active TB* is a *positive response to a TB skin test*. However a negative TB skin test result does not absolutely rule out TB infection, especially in persons with TB-like symptoms, HIV infection, or AIDS. A positive TB skin test may indicate infection, but does not mean a person is infectious unless other symptoms and sputum smears are positive.

Tuberculosis is curable if it is diagnosed early and if effective treatment is instituted without delay.

Symptoms Associated with Tuberculosis

- Prolonged productive cough of greater than two weeks duration
- Fever
- Chills
- Night Sweats
- Weight Loss
- Loss of Appetite
- Weakness
- Chest Pain
- Bloody Sputum

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How Do I Protect Myself?

- Have a TB skin test done yearly.
- Know the signs and symptoms of TB.

When caring for a client who has undiagnosed symptoms that are similar to TB, call the Director of Client Care Services immediately.

Use respiratory protection with known active infectious TB. Special TB masks that are called HEPA filtered respirators are available to use in these cases. You will be assisted in fitting and trained in use of masks when you are working with a known or suspected TB case.

If you are exposed to a person with active infectious TB, notify the Homecare Agency promptly so appropriate medical follow-up can be arranged.

If you have an x-ray, please call the office to update your signs and symptoms each year.

Hepatitis B

Hepatitis B Vaccination – Protection For You

What is HBV?

Hepatitis B virus (HBV) is a potentially life-threatening bloodborne pathogen. Centers for Disease Control estimates there are approximately 280,000 HBV infections each year in the US.

Approximately 8,700 health care workers each year contract hepatitis B, and about 200 will die as a result. In addition, some who contract HBV will become carriers, passing the disease on to others. Carriers also face a significantly higher risk for other liver ailments which can be fatal, including cirrhosis of the liver and primary liver cancer.

HBV infection is transmitted through exposure to blood and other infectious body fluids and tissues. Anyone with occupational exposure to blood is at risk of contracting the infection.

Employers must provide engineering controls; workers must use work practices and protective clothing and equipment to prevent exposure to potentially infectious materials. However, the best defense against hepatitis B is vaccination.

Who Needs Vaccination?

The new OSHA standard covering bloodborne pathogens requires employers to offer the three-injection vaccination series free to all employees who are exposed to blood or other potentially infectious materials as part of their job duties. This includes health care workers, emergency responders, morticians, first-aid personnel, law enforcement officers, correctional facilities staff, launderers, as well as others.

The vaccination must be offered within 10 days of initial assignment to a job where exposure to blood or other potentially infectious materials can be "reasonably anticipated". The requirements for vaccinations of those already on the job take effect July 6, 1992.

What Does Vaccination Involve?

The hepatitis B vaccination is a noninfectious, yeast-based vaccine given in three injections in the arm. It is prepared from recombinant yeast cultures, rather than human blood or plasma. Thus, there is no risk of contamination from other bloodborne pathogens nor is there any chance of developing HBV from the vaccine.

The second injection should be given one month after the first and the third injection six months after the initial dose. More than 90 percent of those vaccinated will develop immunity to the hepatitis B virus. To insure immunity, it is important for individuals to receive all three injections. At this point it is unclear how long the immunity lasts, so booster shots may be required at some point in the future.

The vaccine causes no harm to those who are already immune or those who may be HBV carriers. Although employees may opt to have their blood tested for antibodies to determine need

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2245 Post Street • San Francisco • California 94115

for the vaccine, employers may not make such screening a condition of receiving vaccination nor are employers required to provide prescreening,

Each employee should receive counseling from a health care professional when vaccination is offered. This discussion will help an employee determine whether inoculation is necessary.

What If I Decline Vaccination?

Workers who decide to decline vaccination must complete a declination form. Employers must keep these forms on file so that they know the vaccination status of everyone who is exposed to blood. At any time after a worker initially declines to receive the vaccine, he or she may opt to take it.

What If I Am Exposed But Have Not Yet Been Vaccinated?

If a worker experiences an exposure incident, such as a needle stick or a blood splash in the eye, he or she must receive confidential medical evaluation from a licensed health care professional with appropriate follow-up. To the extent possible by law, the employer is to determine the source individual for HBV as well as human immunodeficiency virus (HIV) infectivity. The worker's blood will also be screened if he or she agrees.

The health care professional is to follow the guidelines of the US Public Health Service is providing treatment. This would include hepatitis B vaccination. The health care professional must give a written opinion on whether or not vaccination is recommended and whether the employee received it. Only this information is reported to the employer. Employee medical records must remain confidential. HIV or HBV status must NOT be reported to the employer.

Hepatitis B

All employees subject to occupational exposure will be offered hepatitis B vaccine series within 10 days of employment. Any accidental splash of body fluids into eyes, mucous membranes or non-intact skin will be immediately flushed for 5 minutes with clean water. The Director of Patient Care Services is notified immediately after flushing, with medical follow-up arranged as necessary.

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Hepatitis B Immunization Program

Return this form to instructor when completed.

Employee Name (Print)_____Date:_____

A. Consent

I hereby acknowledge that the information about the vaccine that is summarized below has been reviewed with me. The purpose of being given Hepatitis B vaccine is to tender me immune to the disease called Hepatitis B or "Serum Hepatitis". Adverse reactions to the vaccine are reported to be generally uncommon and usually mild and temporary. The most common reaction are: local pain and swelling occurring at the site of injection, nausea, and temporary mild fever. There may, however, be other reactions not listed here.

Even after receiving the vaccine, there is still a small chance that I may still get Hepatitis B.

Except for past illness due to exposure to Hepatitis B, there is no way, other than vaccination, to be made immune to the disease. I have had an opportunity to ask questions about the Hepatitis B vaccine and have received satisfactory answers. I understand that I must receive three (3) doses. I have been informed that the vaccine is prepared from yeast.

I consent to having the vaccine given to me. I understand that within ten (10) days of my initial assignment I will contact the Agency to arrange for the vaccine.

Signature

Date

For Women

I have been advised that studies have not been conducted to determine the affect of the vaccine on a developing fetus. Therefore, the safety of the vaccine is not known on the development fetus.

Signature

Date

B. Declination – Decline At This Time

I understand that due to my potential occupational exposure to blood and other potentially infectious material, I may be at risk of acquiring Hepatitis B Virus (HBV) infection. I have been given the opportunity to be vaccinated with Hepatitis B vaccine at no charge to myself. However, I **DECLINE** Hepatitis B vaccination at this time. I understand that by declining this vaccine, I continue to be at risk of acquiring Hepatitis B, a serious disease. If in the future I continue to have occupational exposure to blood or other potentially infectious materials and I want to be vaccinated with the Hepatitis B vaccine, I can receive the vaccination series at no charge to me.

Signature

Date

C. Declination – Vaccination Previously Received

I have previously been vaccinated for Hepatitis B. My last injection was given on _____(date).

I _____did _____did not receive follow-up testing post-vaccine.

Signature

Date

Agency Representative:_____Date:_____

NAME: _____

DATE: _____

Universal/Standard Precautions Infection Control
Tuberculosis (TB)

Please return to instructor when completed.

1. "Universal/Standard precautions" means treating everyone's blood and other body fluids as infectious.
True _____ False _____
2. Contaminated sharp (needles, broken glass, etc.) must be placed in a covered, puncture-resistant, leak proof container that is red and has a biohazard label.
True _____ False _____
3. Latex gloves will keep you from being stuck by sharps.
True _____ False _____
4. A mask and eye protection must be worn if fluids could splash or spray into your eyes, nose or mouth.
True _____ False _____
5. Cuts, scrapes, and rashes should be covered even if you are wearing gloves.
True _____ False _____
6. There is no vaccine for HBV (Hepatitis B).
True _____ False _____
7. If you come in contact with blood or other body fluids, you should wash your skin immediately.
True _____ False _____
8. Gloves are only needed during surgery, autopsy, and embalming.
True _____ False _____
9. An infected person who sneezes, coughs or sings can spread TB in the air.
True _____ False _____
10. Symptoms of active TB include persistent cough, bloody sputum, weight loss, and fever.
True _____ False _____
11. If you are infected with TB, you may have to complete an entire course of medication for at least six months.
True _____ False _____
12. If someone has active TB, isolation and the use of a mask are indicated.
True _____ False _____
13. The Mantoux TB skin test is the preferred method of testing for detection.
True _____ False _____
14. Covering the mouth and nose while coughing and sneezing and frequent hand washing are good infection control measures.
True _____ False _____

IV. Environmental Safety

During this part of our session we will be exploring Environmental Safety.

We will view a video that presents many of the important concerns that involve you, your work place, and your client.

After the video, there will be a discussion. You will have the opportunity to ask questions, make comments, and raise concerns.

Emergency Preparedness Plan

Purpose

To establish a plan which will allow for the continuation of services in the event of a major disaster.

Policy

The agency has developed the following emergency preparedness plan for providing continuing client care and support at a safe and therapeutic level in the event of an emergency that would result in interruption of client care.

1. Emergency situations include, but are not limited to, the following:
 - Inclement weather (i.e., heavy rains etc.)
 - Natural disasters (i.e., flood, earthquake, etc.)
 - Major industrial or community disaster (i.e., power outage, fire, road blocks, etc.)
 - Labor/strike conditions
 - Agency personnel illness affecting significant number of personnel
2. The decision to implement the emergency preparedness plan will be made by the Director of Patient Care Services or designee upon becoming aware of any emergency situation.
3. The clinical supervisor and/or designee will be responsible for triaging all client care according to the following categories:
 - Category I: clients who can safely forego care or a scheduled visit without a high probability of harm or deleterious effects; this category may include routine supervisory visits, evaluation visits, clients with frequencies of one or two times a week if health status permits, or if a competent family/caregiver is present.
 - Category II: clients with recent exacerbation of disease process; clients requiring moderate level of care that should be provided that day; clients with essential untrained families/caregivers not prepared to provide needed care.
 - Category III: clients who cannot safely forego care and require health care intervention regardless of other conditions. Clients in this category may include: highly unstable clients with a high probability of hospitalization if homecare is not provided; clients with no family/caregiver or other outside support.

Procedures

1. The Clinical Supervisor and/or designee(s) will assign category classifications for all current clients.
2. The Clinical Supervisor and/or designee(s) will assign all available, qualified personnel to care for first, Category III clients and second, Category II clients. Category I clients and any Category II clients who do not receive scheduled care services will be notified by phone as soon as possible.

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3. New clients will not be accepted for care until the emergency situation is controlled or staffing levels permit. Clients accepted, but not yet admitted, will be triaged as noted above.
4. In the event of a prolonged emergency situation, the Administrator/Project Director and/or designee will:
 - Determine staffing availability and limitations including assistance available from external staffing agencies.
 - Identify those clients who could be discharged from homecare earlier than anticipated.
 - Determine course of action based on above information.
 - Identify clients with continuing care needs.
 - Contact other area homecare organizations to determine degree to which they may accept new clients if the decision is made to transfer.
 - Notify attending physicians regarding recommendations for continued care for clients on caseloads.
 - Make transfer or discharge arrangements as indicated, notifying clients and families/ caregivers as appropriate.
 - In prolonged emergency situations, the agency will retain only those clients for which it can safely and adequately provide care.
5. Safety of clients and agency personnel will take priority in all emergency situations.
 - Weather and road conditions will be monitored via local weather reports and state patrol reports.
 - Natural or community disasters will be monitored via the Emergency Broadcasting System, reports from local authorities, reports from other local health care facilities.
 - Strike conditions will be monitored via liaison with local unit representatives.
6. In all emergency situations, the Director of Patient Care Services or designee will maintain communications and act as the spokesperson between other facilities, media, and safety authorities.

V. Home Safety

Environmental Safety

Purpose

To outline the mechanism to identify any environmental mobility and bathroom safety risks related to client care services.

Policy

The agency is committed to providing a safe environment for care/service to the client and his/her family/caregiver.

Procedure

1. During the initial visit, the clinician admitting the client for care/service will conduct a home safety check to identify environmental safety issues.
2. The home safety assessment will include, but is not limited to:
 - Infection control
 - Medication safety
 - Fall prevention
 - Lighting
 - Communication
 - Bathroom safety
 - Fire safety
 - Electrical safety
 - Child safety (as applicable)
3. Based on the assessment, the clinician will provide prevention tips and suggestions on reducing any environmental safety risks.
4. Additional resources to assist in client education can be requested by agency personnel.
5. The following safety precautions have been established for all personnel to follow when emergency conditions warrant such action. These safety precautions are not all-inclusive. Others may be added or become necessary during the actual emergency.

Severe Weather/Earthquakes:

- Have emergency equipment and medical supplies readily available.
- Move client away from windows.
- Stay away from windows.
- Store all glass and other breakable objects.
- Turn hallway lights ON. If electricity is out, use flashlights. Do not use candles until certain there is no gas leak.
- Close all drapes.

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- CLOSE exit doors.
- Monitor weather bulletin/radio announcements.
- Do not go outside unless assured that it is safe to do so.
- REMAIN CALM. DO NOT PANIC.

Floods:

The following safety precautions have been established for all personnel to follow during flood warnings, alerts, or an actual flood. These safety precautions are not all-inclusive. Other precautions may become necessary or required.

A. Precautions before the flood:

1. When a flood alert or warning is issued, store drinking water.
2. TURN OFF all unnecessary electrical appliances.
3. Do not touch any electrical appliance unless it is dry.
4. Open basement windows to equalize water pressure on the walls and foundation.
5. Move client to upper floor or to other designated areas.
6. Move all essential equipment and supplies to safe areas.

B. After the flood:

- 1 Do not use any open flame devices until the home has been inspected for possible gas leaks.
2. Watch for live electrical wires.
3. Do not turn on any electrical appliance until it has been inspected.
4. Do not use any food supplies that have come in contact with floodwaters.
5. Provide emergency medical treatment required.

C. Flash Floods:

1. Flash floods can happen without warning.
2. When a flash flood warning is issued, take immediate action
3. Protect client, as well as yourself to the best of your ability.

Fire Safety

Purpose

To define the requirements of a fire safety assessment and fire response for clients and agency personnel while in the home.

Policy

Seniors•At•Home is committed to promoting client safety in the event of a fire. At a minimum, all personnel will:

- Be knowledgeable of the principles of fire safety.
- Assess each client home for first visit, and subsequently, as warranted.

Procedure

1. During the initial home visit, the clinician admitting the client for care/service will conduct a home safety check, which includes an assessment of fire safety.
2. The assessment will include, but is not limited to:
 - Presence of smoke alarms
 - Smoking in the home
 - Oxygen use
 - Fire extinguisher availability
3. In addition, the professional should identify the emergency numbers to call in the event of a fire (i.e., police, fire, 9 11). This information should be kept near the telephone.
4. Based on the assessment, prevention tips and suggestions should be made so as to reduce the risk of fires and potential hazards in the home. Prevention tips may include, but are not limited to:
 - Always use caution when smoking; avoid smoking in bed.
 - Relocate heaters away from passageways and flammable materials.
 - Store flammable and combustible items away from the range and oven.
5. If an agency personnel discovers a fire while in the home, the following steps should be taken:
 - Remove anyone in IMMEDIATE danger.
 - Close the door to the room of fire origin, if possible.
 - Notify the fire department (use 911, if appropriate).
 - Stay calm. Don't panic.
 - Remain with the client/family/caregiver.
 - Notify the homecare office.

Utilities

Purpose

To outline the responsibilities of the agency and agency personnel regarding utilities management in the home.

Policy

All personnel will be knowledgeable of the principles of electrical safety and utilities management and will assess clients homes for electrical safety on the first visit, and subsequently, as warranted.

Procedure

1. During the initial home visit the admitting clinician will conduct a home safety check, which includes an assessment of electrical safety.
2. The assessment will include, but is not limited to:
 - Placement of electrical cords
 - Condition of electrical cords/outlets
 - Use of extension cords
3. Based on the assessment, prevention tips and suggestions should be made so as to reduce the risk of electrical problems and potential hazards in the home. Prevention tips may include, but are not limited to:
 - Removal of cords from under furniture or carpeting
 - Replace damaged or frayed cords
 - Follow UL rating label guidelines when using extension cords
 - Never use nails or staples to secure wires
 - Replace bulbs with the correct type and wattage
 - Never defeat the grounding feature; move cords and appliances away from sink areas and hot surfaces

Medical Equipment

Purpose

To delineate the process to follow in the event of medical equipment malfunction.

Policy

It is agency policy to report and document any medical equipment malfunction and serious injury, illness, or death associated with any medical equipment (whether the equipment has malfunctioned or not).

Procedure

1. Personnel should report any medical equipment malfunction to their clinical supervisor.
2. The clinical supervisor is responsible for reporting the malfunction to the equipment company.
3. An incident report will be completed.
4. If the medical equipment malfunction or misuse results in serious injury, illness, or death the Director of Patient Care Services should be notified immediately. The Director of Patient Care Services must report the illness, injury, or death in association with any medical device to the FDA within ten working days of the event in order to be in compliance with the Safe Medical Devices Act of 1990.

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Emergency Instructions

If you have a health emergency, difficulty breathing, bleeding, severe weakness, or any other condition that you feel warrants immediate medical attention, call your physician, or 911 immediately. Notify the Homecare Agency.

In the event of a disaster, such as an earthquake, the Homecare Agency will make every effort to continue to provide services. However, if telephone communications are impaired, our ability to contact you may be difficult or impossible. If highways and streets are damaged or closed, our ability to visit may also be limited or impossible.

It is recommended that you carry with you a battery operated radio and a flashlight, and that you have these available in your home and at work. If a disaster occurs, stay tuned to one of these radio stations:

KNBR AM-630
KCBS AM-740
KGO AM810
KDLA AM1310

These radio stations will provide updates and general emergency instructions in the event of a disaster.

For general instructions regarding emergencies, refer to the Pacific Bell telephone book. In front of the white pages there is a section entitled: "First Aid and Survival Guide." Familiarize yourself with this section before a crisis. Furthermore, we recommend that you are current in a Basic First Aid and CPR.

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Important Phone Numbers

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415-449-3700

Weather Report

National Weather Forecast Office Phone Number
831-656-1725

Weather Forecast Phone Number 415-837-5000 Ext. 2010

Road Conditions

State Transportation: Dept. of Cal Trans

Outside Local Calling Area 817-1717

San Francisco Area: District 4 1-510-286-4444

State Highway Patrol

Outside Local Calling Area 1-800-427-7623

VI. Elder Abuse

Elder abuse, as defined by Chapter 1184 of the California Statutes of 1982 (AB 1805) is the "infliction of injury, intimidation, cruel punishment, or other treatment with resulting physical harm or pain or mental suffering, or the deprivation by a caregiver of goods or services which are necessary to avoid physical harm or mental suffering."

Neglect is "the failure of any person having the care of custody of a dependent adult to exercise that degree of care which a reasonable person in a like position would exercise"

Abuse and/or neglect may be intentional, or due to the caregiver's lack of knowledge or capacity to care for the person. Caregivers who are under stress (either physical or emotional), caregivers who do not have the knowledge to meet the needs of their client, caregivers who may suffer from some forms of emotional and/or physical illnesses, and caregivers who have drug or alcohol related problems are particularly at risk for committing elder abuse.

As an employee of the Agency, you are mandated by the State of California to report any evidence of, or suspicion of elder abuse.

Notify the Agency immediately if you have evidence of, or are suspicious of, any event, situation, or condition in which your client may be the victim of abuse.

In an emergency, when you and/or the client is in immediate urgent danger, call 9-1-1

In addition, you may report Elder Abuse to the following numbers:

San Francisco County: 415-557-5230
San Mateo County: 1-800-675-TIES (8437)
Santa Clara County: 408-928-3860
Marin County: 415-499-7118
Alameda County: 510-567-6894

Indications and Examples of Abuse

Physical

- Direct beatings or evidence of and/or explained bruises, burns, bleeding, wounds, welts or other skin injuries.
- Presence of old and new bruises at the same time.
- Bruises that may resemble confinement, such as bedsores, rope burns.
- Poor skin hygiene; soiled clothing or bed.
- Dehydration, malnutrition, or weight loss without explored cause.
- Medication mismanagement: too much, too little, or none.

Psychological and Verbal

- Verbal assaults, threats, fears, isolation, withholding emotional support.
- Unusual or unrealistic isolation or restrictions.
- Client appears frightened, depressed, helpless, anxious, confused, disoriented, and/or angry.
- Client unrealistically or inappropriately not allowed be with others without the caregiver being present.

Material

- Theft, misuse of funds or property, extortion, duress, fraud.
- Unusual bank activity or questionable check signatures.
- Recent changes in will, power of attorney, house title, or other documents that might indicate an unusual benefit by another person.
- Unusual interest by another in the amount of money the client has, where it is, who is entitled to it, or concern that too much is being spent for client care or well being.
- Lack of necessary assertive devices, such as walkers, commodes, canes, wheelchairs.
- Non-provision of personal aids, such as glasses, hearing aids, dentures.

Violation of Rights

- Coercion, locking up, forced removal from home or forced entry into a facility, such as a nursing home.

Denial of Basic Human Needs

- Food, shelter, clothing, health care, psychological support.
- Lack of medical care.

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Statement of Understanding and Intention to Comply with Child, Elder, and Dependent Adult Abuse Reporting Requirements

Please return to Instructor.

California state law requires care custodians, health practitioners, and employees of protective services agencies and local law enforcement agencies who have knowledge of, observe or reasonably suspect abuse of children, elders or dependent adults to report the known or suspected abuse to child or adult protective services immediately or as soon as practically possible by telephone and to prepare and send a written report to the protective agency within 36 hours of receiving the information concerning the incident.

Definition of Health Practitioners – as defined by Welfare and Institutions Code Section 15610 (1): “Health Practitioner” means physician, surgeon, psychiatrist, psychologist, dentist, resident, intern, podiatrist, chiropractor, licensed nurse, dental hygienist, licensed clinical social worker, marriage, family and child counselor or any other person who is currently licensed under Division 2 (commencing with Section 500) of the Business Professions code.

Definition of Case Custodian – means an administrator or employee, including members of support staff and maintenance staff of any of the following public or private facilities: Home Health Agencies.

The report must include:

- A. The name of the person making the report.
- B. The name, age, and present location of the child, elder or dependent adult
- C. The names and addresses of family members or other persons responsible for the care, if known.
- D. The nature and extent of the person’s condition.
- E. Any information that led the reporter to suspect that abuse has occurred.
- F. The date of the incident.

State law also mandates the reporting of other types of abuse such as neglect, intimidation, fiduciary abuse, abandonment or other treatment that results in physical harm, pain or mental suffering. These reports may be made when the reporter has actual knowledge or reasonably suspects that abuse has occurred.

The law provides that care custodians, health practitioners, or employees of child/adult protective services agencies shall not incur either civil or criminal liability for any report they are required or permitted to make under this law.

Failure to report physical abuse is a misdemeanor punishable by fine or imprisonment.

I certify that I have read and understood this statement and will comply with the law.

Signature and Date _____

Incident Reporting

Definition

An incident is defined as an unusual event involving agency personnel, patient and/or family/caregiver. The event is considered unusual if the result was unintended, undesirable and/or unexpected. An incident is also any event that is not consistent with the routine operation of the agency or the routine care/service of a patient. It may be actual or potential

Reportable Occurrences

1. Loss or Breakage to client's equipment, property or belongings.
 - Patient/family/caregiver reports missing articles from home after home visit.
 - The Homecare Agency employee is involved in damage/breakage to client's personal belongings or equipment.
 - The Homecare Agency employee discovers client's equipment or personal belongings missing from the premises.
2. Equipment/Medical Device
 - Not delivered, not working, not used
 - Injury resulting from use
 - Potential injury from use.
3. Building Security, such as: fire, unidentified persons in the home/premises.
4. Patient Endangerment
 - Suspected abuse or neglect by family/caregiver.
 - Patient confused and essentially helpless without adequate care by others.

Notification to the state Elder-at-Risk program and/or Protective Services must be made by mandated reporters.

5. Homecare Agency personnel endangerment, such as; verbal and/or physical assault while on duty.
6. Inappropriate behavior exhibited towards the Homecare Agency employee.
7. Pressure sores: development of new pressure sores or one that worsens.
8. Refusal of treatment, such as: Patient/family/caregiver refuses treatment after start of care, against the professional advice of agency personnel.
9. Problem with Procedures, Protocol Errors, Agency Policies.
10. Medication mismanagement, misuse, refusal, side effects, untoward outcomes.

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11. Attended/Unattended Falls
 - Patient sustains injury subsequent to falling while agency personnel present.
 - Patient/family/caregiver reports a fall sustained by the patient during the course of his/her time on service.
12. Cardiac Arrest: witnessed cardiac or respiratory arrest.
13. Other:
 - Agency personnel accept compensation or private employment from patient/family/ caregiver.
 - Any reference to legal action by patient, family/caregiver, physician or attorney.
 - Any occurrence or observation that the agency personnel believe involves actual or potential injury to the patient, the company or its agency personnel.

What To Do

If you have been involved in, or have knowledge of an incident or potential incident, you must notify the Homecare office immediately. Call the Homecare office and be prepared to give an accurate, objective account of the circumstances. DO NOT discuss the incident with anyone other than the Homecare office unless you are directed to do so by the Homecare office or an authorized law enforcement representative. Document the circumstance, to whom and the date and time of reporting, and the action taken. A representative from the Homecare office will provide you with the necessary forms that you will complete and submit to the Homecare office.

VII. Clients with Special Needs

As our employee you may be asked to take an assignment to care for an individual with Dementia or Alzheimer's disease. For the best possible care for the client, and the best assignment for you, our Homecare staff must have an understanding of your experience working in this situation.

Taking care of a person with Dementia and/or Alzheimer's disease is a unique situation requiring special skills. You are required to be knowledgeable about, and to have had experience with, taking care of individuals with Dementia and/or Alzheimer's disease if you accept this assignment.

Alzheimer's Disease

Alzheimer's disease is a progressive, degenerative disease that attacks the brain and results in impaired memory, impaired thinking, impaired behavior and impaired judgment. It affects an estimated 2.5 million American adults. The incidence of Alzheimer's disease is more likely to occur as a person gets older.

Scientists continue to look for the cause of Alzheimer's disease. For one form of the disease, there is strong evidence that a defect exists in a single gene in a chromosome. In addition, scientists continue to explore areas such as a slow virus and environmental toxins, such as aluminum. Alzheimer's disease cannot be prevented, nor is there a cure or a treatment available to stop or reverse the disease. Medications are available that appear to slow down the loss of memory. Other medications may be helpful in managing some of the most troubling symptoms associated with Alzheimer's disease, such as depression, behavioral disturbances, sleeplessness, and anxiety.

Alzheimer's disease has a gradual onset. In the early stages, the person may try very hard to cover up what might be the obvious symptoms that the disease is present. These symptoms, such as memory loss, loss of intellectual abilities, disorientation to time and place (and eventually to person), lack of judgment, and changes in personality and behavior progress to the point where the symptoms interfere with the person's work, social activities, and activities of daily living. Eventually the symptoms render the person unable to assume self-care. How quickly, and to what extent these symptoms occur and progress, varies from person to person. The average life span for people with Alzheimer's disease is about eight years, although many people with Alzheimer's disease live considerably longer.

There is no single diagnostic test for people with Alzheimer's disease. A complete physical, psychiatric, and neurological evaluation should be obtained when symptoms are noticed. Although computerized imaging of the brain may indicate specific changes that may be consistent with Alzheimer's disease, a definitive diagnosis of the disease cannot be made until after death. At this time, if the disease is present, microscopic examination of the brain reveals the presence of neurofibrillary tangles and clusters of degenerating nerve endings called neuritic plaques.

Communication Techniques for Working with People with Alzheimer's Disease

1. Never assume that the person cannot understand what is being said.
2. Use creativity and flexibility; if one approach does not work, be ready to try another.
3. Create a calm environment and establish routines.
4. Create a safe environment; remove all hazards that could be dangerous.
5. Simplify each task and activity as much as possible, breaking them into easy steps.
6. Do not frighten the person by approaching or talking from behind.
7. Discuss only concrete actions and objects; avoid the abstract.
8. If it is necessary to repeat statements, use the same words. If this does not work, try to rephrase the sentence using more concrete words.
9. Present only one idea at a time; do not try to give too much information in one sentence - use short sentences; give simple messages.
10. Concentrate on the present; avoid the past and the future.
11. Do not offer choices that make decisions difficult.
12. Avoid situations that may bring about frustration or anger.
13. Anticipate the person's needs.
14. Do not argue with the person. Agree, if possible, distract and divert.

Challenging Situations

Exercise Scenarios

Situation #1:

The person with Alzheimer's disease is sitting in a chair. She is staring straight ahead, clenching her teeth and rubbing one hand over the other. You attempt to find out what is bothering her.

Situation #2:

The person with Alzheimer's wants to look at a certain old picture that is hanging on a wall somewhere in the house. He cannot remember where the picture is and has difficulty telling you what he is looking for

Situation #3:

The person believes it is Sunday rather than Wednesday and wants to go to church. She repeatedly asks how soon you'll be ready to leave with her

Situation #4:

The person with Alzheimer's begins telling a story that seems made-up. Throughout the story, the person with Alzheimer's asks you questions that pertain to the story. You feel compelled to respond.

Situation #5:

The person with Alzheimer's insists that you remind him how to drive the car. When you try to distract him or change the subject, he only grows angrier.

Parkinson's Disease

Parkinson's is a progressive and irreversible disease. While the intellectual skills are not affected and the client can work and participate in many activities, the use of the body becomes progressively impaired. As the medications only take care of the symptoms as the disease progresses, it is important that these client's receive their medications on time. This is usually a long term assignment, and as these clients will need increasing assistance with their activities of daily living, the assignment requires that you have excellent body mechanics and transfer skills. In addition, you must be able to recognize your limitations and inform the agency if and when the assignment exceeds your abilities.

Parkinson's Disease is a slowly progressive disorder of the central nervous system. It is caused by the degeneration of the pigmented neurons in a specific part of the brain called the Substantia Nigra, resulting in a decrease in the availability of dopamine.

The exact cause of Parkinson's Disease problem is unknown.

There are four major symptoms of Parkinson's Disease:

1. Bradykinesia (slowness in initiating movement which may contribute to decrease facial expression, change in speech patterns, small-lettered handwriting, trouble with fine finger movements)
2. Rigidity: Stiffness when the arm, leg, or neck are moved
3. Resting tremor: tremor most prominent at rest, when sitting quietly
4. Loss of postural reflexes: poor balance and coordination.

Secondary symptoms may include depression, emotional changes, memory and sleep problems, changes in speech patterns, urinary and bowel difficulties, low blood pressure upon standing, or problems in chewing or swallowing.

The progression of the disease varies among patients. For some the disease will progress slowly over a 20-30 year period, while progressing much faster for others. Without treatment, pronounced disability occurs in about nine years.

Symptomatic treatment of Parkinson's Disease is usually successful, especially in the early years, although it does not stop the progress or cure the disease. The treatments include:

- **Medications:** Medication regimes can provide dramatic relief from the symptoms of Parkinson's. The therapy is tailored individually to each person and often takes time to identify the medicine and the dosage that will work best to relieve the symptoms. The goal is to provide the amount and combination of medications that will relieve the symptoms without causing side effects. The side effects may include nausea and vomiting, low blood pressure, involuntary movements, depression and restlessness.

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Levodopa is a drug commonly prescribed. It helps replenish the brain's low supply of dopamine, and helps mask the debilitating symptoms for many with Parkinson's Disease. Other drugs include blocking neurotransmitters, which oppose dopamine's action, and those drugs that inhibit the enzyme that shuts off dopamine's action. In addition, new drugs that mimic the action of dopamine, called dopamine agonists, are also available and may be used alone or in combination with levodopa.

- **Diet and Exercise:** People with Parkinson's Disease find that eating a well balanced diet is important in maintaining their general health and strength. In some cases the doctor may recommend adjusting the consumption of protein for those taking levodopa, because protein may interfere with the absorption of the drug.

People with Parkinson's Disease find that exercise, especially swimming and walking, helps maintain muscle tone and strength and improves mobility. In addition, physical therapy or muscle-strengthening exercises, in addition to range of motion exercises are often recommended.

Stroke
(CVA: Cerebrovascular Accident)

The care of a client who has had a stroke may vary greatly from client to client. In addition to other factors, the client's condition is determined by the part of the brain that has been injured, and the amount of damage that has been done. The client may rehabilitate to being independent and no longer requiring assistance, or the deficits may be such that long term assistance is required. In some situations you may be asked to be trained in specific exercises, transfer techniques, and/or the provision of special needs.

A stroke, or CVA, is an interruption in the blood flow to the brain. Approximately 500,000 people a year have a stroke in the US. It is often referred to as "brain attack" because of its' similarity to a "heart attack." which is an interruption in the blood flow to the heart. In both instances an area is deprived of oxygen and the affected area is impaired.

A stroke can be caused by a hemorrhage in the brain, a thrombosis, an embolysis, or a tumor. The extent of damage that is caused by the stroke is determined by the area in the brain that is affected and the amount of area involved. Thus, some people suffer "mild" strokes, while others may have a massive, fatal stroke.

There are several important warnings of a stroke:

1. Sudden temporary weakness or numbing of the face, arm, or leg.
2. Temporary difficulty or loss of speech or trouble understanding speech.
3. An episode of double vision.
4. Unexplained headaches or change in the pattern of headaches.
5. Temporary dizziness or unsteadiness.
6. A recent change in personality or mental ability.

Risk Factors:

Certain medical conditions, including high blood pressure, TIA'S (transient ischemic attacks), previous stroke, heart disease (especially atrial fibrillation), diabetes, and carotid artery disease are major risk factors for a stroke

Stroke risk can be reduced by:

1. Controlling your blood pressure
2. Not smoking
3. Limiting alcohol use
4. Lowering cholesterol
5. Controlling your weight
6. Seeking medical attention and accepting treatment for atrial fibrillation.

One of the most important factors related to stroke is seeking medical attention promptly. There is evidence that suggests that the sooner medical attention is obtained and treatment is begun, the more successful the treatment results will be.

The brain is a complex organ in which one side of the brain controls the opposite side of the body.

Damage to the left side of the brain typically causes impairment to the right side of the body, and results in problems with speech and language skills.

- The comprehension ability of these people is usually better than their ability to speak.
- These people are likely to recognize that there is a problem, and become frustrated and/or depressed.
- They may be slow, anxious and hesitant when approaching the unfamiliar.

Damage to the right side of the brain typically causes impairment to the left side of the body.

- These people may appear unaware that they have any problems.
- Because the speaking ability of these people may appear intact, it is often easy for others to overlook the person's problems.
- These people more commonly have special-perceptual deficits, resulting in problems judging distance, size, position, rate of movement, and form and relations of parts to the whole.
- These people often suffer from "one sided neglect". In this situation, the person cannot recognize or perceive one side of the body or one side of vision.
- Although these people may be able to describe a task in detail, they may not be able to do it. They may become uncooperative, unmotivated, dependent and/or confused when encouraged to perform. These people may be impulsive and act too fast, overestimating their own abilities.
- These people may go beyond what is safe and use poor judgment.

Damage to any part of they brain may cause:

- Problems with "Quality Control". This is the inability to guide and check one's own behavior; doing the right thing at the right time.
- Memory impairment, including decreased retention span and remembering selectively or parts of a message
- Difficulty learning, especially new information
- Difficulty applying information learned from one setting to another
- Emotional labile: Unpredictable and uncontrollable crying and loss of emotional control
- Depression
- Sensory deprivation. Signals from the outside world that are cut off or decreased may result in confusion, delusions, and/or hallucinations

HIV and AIDS

Clients with HIV/AIDS are highly susceptible to infections. For this reason, you will need to be aware of the many ways in which infections can be spread. In addition to what you practice for standard infection control and universal precautions, you will be given specific information regarding household management and the selection and preparation of food. The individual plan may also include specific instructions for exercise and rest.

AIDS is caused by a virus called HIV (Human Immunodeficiency Virus)

When a person is infected with HIV, the virus infects and can kill certain cells in the immune system called T-helper cells. This weakens the immune system so that other specific infections can occur. The person is diagnosed as having AIDS (Acquired Immunodeficiency Syndrome) when they become sick with other specific infections or when the number of T-helper cells has dropped very low.

People at highest risk of AIDS and HIV infection

- People who share needles
- Men who have sex with other men
- Babies born to mothers who have HIV
- People who received blood transfusion or blood products before 1985 (antibody test available) which might have been infected with HIV
- Anyone who has sex with anyone who has or is at risk of AIDS or HIV infection

HIV is in blood and other body fluids

The virus is in the blood, semen, menstrual blood, vaginal secretions, and breast milk, and rarely in saliva and tears. The virus can be there even if the person has no symptoms of HIV infection or AIDS. People who are infected with HIV will carry the virus for the rest of their lives

HIV is spread by exposure to HIV infected blood and HIV infected body fluids

HIV can be spread during sex, by sharing dirty needles to inject drugs, or from mother to baby (before or during birth, or by breast-feeding). HIV is rarely spread by being stuck by a needle, or by getting blood or other infected body fluids onto a mucous membrane (mouth or eyes) or onto broken skin. The virus is not spread by casual contact like living in the same household, or working with a person who carries HIV.

Certain symptoms and conditions may be associated with HIV/AIDS

These symptoms and conditions may include: fever, weight loss, swollen lymph glands in the neck, under arms or groin, white patches in the mouth (thrush), certain cancers (Kaposi's sarcoma, certain lymphomas, certain invasive cervical cancers), and infections (Pneumocystis pneumonia, certain types of meningitis, toxoplasmosis, certain blood infections, TB, etc.).

A blood test may tell if you have HIV infection or AIDS

You can get an HIV blood test at your doctor's office or at Counseling and Testing Sites throughout California. Call your local health department for information.

There is treatment for people with HIV infection and AIDS

Many drugs are available to treat the infection and cancers associated with AIDS. There are also drugs available for people with HIV infection that can help prevent them from getting sicker.

HIV and AIDS are preventable:

- Abstinence, monogamy (with an uninfected partner), use of barrier protection (condoms) are the most protective prevention strategies.
- People who use IV drugs should try to get off drugs. If they can't they should always use new needles or should clean needles and works with bleach and water.
- It is recommended that people with HIV or AIDS should discuss their HIV serostatus with their doctors and dentists, and inform their sex and needle-sharing partners.
- Women who are pregnant or planning a pregnancy are encouraged to talk with their doctor about being tested for HIV. If a mother is known to be infected with HIV, there is treatment to decrease the chance that her baby will become infected.
- Universal precautions and standard precautions such as use of gloves, goggles, gowns, etc., are used by health care practitioners for prevention of transmission or any communicable disease including HIV.

Hospice and Palliative Care of JFCS

As the community grows and changes, so do the needs of its members. Today, there is an increasing desire to stay at home with family and loved ones, surrounded by personal belongings, and sentimental memories during the final phase of life. Hospice and Palliative Care of JFCS recognizes the struggle that patients and families may experience as they try to provide quality end-of-life care at home.

Hospice and Palliative Care of JFCS provides compassionate, specialized health care and support for patients facing the advanced stages of life-threatening illness, such as cancer, Alzheimer's, AIDS, ALS, and/or end-of-stage heart or lung disease. The focus of Hospice is on comfort care, not cure. The patient who chooses Hospice care receives a variety of non-curative medical and support services for his or her terminal illness. Emphasis is on providing comfort and relief from pain and other uncomfortable symptoms so that the patient can fully concentrate on living. Services also include ongoing emotional and spiritual support to patients and caregivers.

VIII. Communication

Good, effective communication is a critical part of your role as an employee.

Communication does not mean just talking or speaking- it is a skill that must be learned and practiced!

During this part of our orientation, we will be exploring our individual methods of communicating and discussing how we can develop the tools that will improve our communication skills!

About Communication

What is Communication?

- Exchange of information between people or between people and the environment.
- An interaction between people, things, and/or the environment; a sharing of feelings, words, and thoughts.

When Do We Communicate?

- To learn about others
- To tell information to others (or things)
- To express feelings

How Do We Communicate?

- Communication is presenting something to another person or thing; it is everything that you say and/or do that tries to get the message across.
- It is a combination of what you say (verbal communication), the way you say it, and what you do not say.
- It is what you do while actually saying something (non-verbal communication), such as gestures, mannerisms, posture, eye contact, - things that are considered body language.

Elements Needed to Communicate

- Message: Information sent in a manner that can be understood.
- Sender: First person or thing that communicates.
- Receiver: Person or thing to whom message is sent.
- Feedback: Acknowledgment or indication between sender and receiver that messages are sent or received.

When Does Communication Break Down?

- Sender can't talk
- Receiver can't hear
- Language barrier
- No feedback
- Failure to listen
- Different values and customs

Communicating, Observing, Reporting, and Documenting

Good **communication** skills must be learned and practiced! They include:

1. Being a good listener.
2. Making sure you have the client's attention before speaking.
3. Understanding the client's culture, habits, physical and cognitive limitations.
4. Verifying that the client can hear you.
5. Using simple sentences.
6. Eliminating or reducing environmental and background noises.
7. Speaking slowly and in a "normal loudness level without shouting.
8. Giving the client ample time to respond
9. Addressing the client directly and including the client in discussions.
10. Not chewing or eating while speaking.
11. Accompanying speech with gestures and appropriate body language.

Good **observation** skills are an important part of your job:

1. Clients are not always able to tell us or recognize areas that may be of concern.
Clients depend upon you to use good observation skills.
2. Good observation skills include using your senses of hearing, touching, seeing, and smelling to get the information that will benefit your client.

Good **reporting** skills include knowing when and how to give information to your supervisor and the Homecare AGENCY.

Each assignment and client has a specific person to whom you report. Know who this is **before** you start work.

Good **documentation** is written information that is factual, accurate, spelled correctly, legible, and signed. It includes the date, time, description of the event or circumstance, the date, time, and to whom it was reported, and any action taken.

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Report:

1. When you are ill or injured.
2. When you will be late for or cannot go to work.
3. When the client, another employee, or anyone other than a Homecare Agency representative asks you to change your schedule.
4. When someone other than a Homecare Agency representative asks you to do or not to do something that is on the care plan, or you cannot locate or do not understand the care plan.
5. When you are asked to do something beyond which you are comfortable and/or competent.
6. When there is a problem with any medical equipment in the home.
7. When the client asks you to give or buy medications, alcohol, or drugs.
8. When there is a change in any skin condition, including red, blistered, and/or opened areas.
9. When there is evidence of bruises, burns, or other bodily injury.
10. When the client has a change in urine or bowel frequency, regularity, or appearance.
11. When the client complains of, or has the appearance of, having pain.
12. When the client falls, or you have knowledge of the client having fallen while unattended.

Remember

When you **report** an observation it must be factual, objective, concise, and clear. It **does not** include your or anyone else's personal, professional, or medical opinion. In addition to the above, when the information is written or *documented* it must be **legible, dated and signed**.

Exercise

Is this an opinion or a fact? In each pair, one sentence states an opinion. The other sentence states a fact. Put an **O** next to each opinion. Put an **F** next to each fact.

1. _____ His temperature was 102 degrees.

_____ He felt very hot.

2. _____ He does not look very good.

_____ There are red spots on his face.

3. _____ He fell down when he tried to walk.

_____ He must be tired.

4. _____ His hands are shaking.

_____ He seems nervous.

Communication Techniques

1. Get organized. Have a goal! Know what you are going to write, say or express before you start. Know what you want to accomplish.
2. Be a good listener.
3. Know the client's culture and habits.
4. Make certain that you have the person's attention before speaking.
5. Arrange the furniture if necessary to include visibility of all speakers and listeners.
6. Do not eat, chew, or smoke while talking; keep hands away from the mouth.
7. Use simple sentences.
8. Use normal speech patterns, a normal voice, and a normal loudness level- do not over articulate.
9. Reduce environmental and background noise.
10. Give ample opportunity to respond. Do not interrupt.
11. If the person does not respond, repeat the original statement. If there is still no response, give additional information or state the message in a different way.
12. Accompany speech with gestures and demonstrate what you want or show an object. Use a concrete, actual object when possible.
13. Include the client in all discussions; address questions directly to the client.
14. Ask for clarification; be honest, patient and courteous.

IX. Taking Care of Yourself

The following recommendations will help you do your best work.

1. Know your limits. Do not extend yourself beyond which you are truly physically and emotionally capable and willing.
2. Maintain your basic human needs.
3. Allow time for rest, exercise, diversion, and privacy.
4. Develop good communication skills.
5. Ask for assistance and support from the Homecare AGENCY; do not be afraid to ask questions or seek advice, and/or admit your feelings.
6. Attend seminars and trainings to maintain and improve your professional skills.
7. Be realistic about what you can accomplish.
8. Develop and maintain a sense of humor.
9. Learn to recognize early signs of stress and develop a plan for how to handle it.
10. Know that not every job is right for every person; the better you know your self and the more you are able to communicate with the agency, the easier it will be to avoid and/or handle stress.

X. Working with Survivors of the Holocaust/Nazi Persecution

What is Anti-Semitism?

Anti-Semitism is hostility shown towards Jews, Judaism or the Jewish people as a group. It can take the form of religious bias, social ostracism, boycotts, restrictive laws, physical attacks, verbal slurs, killings or written propaganda. The most extreme example of Anti-Semitism resulted in the Holocaust.

What was the Holocaust?

The Holocaust was the complete destruction of the homes, businesses, neighborhoods and lives of the Jewish people in Nazi-occupied Europe between 1933 and 1945. An estimated 6,000,000 Jews were killed during those years, 1,500,000 million of whom were children. Others killed by the Nazis included gypsies, homosexuals, Jehovah's witnesses, communists and political prisoners.

Who is a survivor?

While the term "survivor" can refer to anyone who has lived through a terrible trauma, in the Jewish community it most often used to refer to survivors of the Holocaust/Nazi Persecution. Their experiences may have included any or all of the following: persecution, deportation from their homes, being forced to live in ghettos, work camps, jails, displaced persons camps or concentration camps, running/hiding in cramped spaces or in the forests, changing identities to hide as non-Jews, or fighting in the resistance. The coping skills employed by the survivors may persist till today, the memories of trauma linger and may be triggered by the aging process and/or everyday experiences.

How can I identify a Holocaust survivor?

Survivors may or may not identify as such directly. However, you may wish to consider the following clues:

- Age/year of birth: Anyone alive during the years of World War II was affected in some way by the war. The youngest of the survivors, those now in their 50s and 60s, were those born just prior to, or during the War, and they identify themselves as "child survivors"
- Accent: If you hear an accent, you may wish to acknowledge it and ask where he/she was born and when he/she emigrated from their country of origin. An immigration date from Europe in the late 1930s, 1940s or 1950s would imply a Holocaust survivor. Later dates from other parts of the world might indicate the same.
- Number or scar on the right forearm: The Nazis tattooed numbers on the arms of concentration camp survivors in order to keep track of survivors for their meticulous record-keeping. While this number is still visible on the arms of some survivors, others had the number removed and show a scar in that area. Please keep in mind that many survived outside of concentration camps and would thus not have been tattooed.

How can the words we use impact clients?

Language is very powerful. We all know that the words we use evoke images, but we often forget that sometimes the same words can mean different things to different people. For example, for most of us the word “extermination” suggests spraying for bugs, while for those who survived the Holocaust/Nazi persecution, it may trigger memories of the war. If we use the words “pest control” we are not only being more specific, but also sensitive to how the words could be understood by others. Another examples is to substitute the words “closing the case” for the word “termination”. There are likely other examples, depending on your setting and the population you serve.

Why might survivors of the Holocaust/Nazi persecution act differently than other clients?

Some survivors may continue to employ the same coping mechanisms that helped them to survive the horrors of WWII. We may be challenged when we encounter behaviors that have at their root these very coping mechanisms and/or the survivors’ experiences during the war. Understanding the source of these behaviors may help us to have increased patience and empathy when working with these clients/families. Some of the coping mechanisms/behaviors include: lack of trust of any authority or agency, seemingly passive/aggressive behaviors, a belief that money can buy safety or a believe they are entitled to service for free because of what they suffered during the war.

Survivors may also experience momentary flashbacks to the war, triggered by seemingly everyday sights and sounds. In response, survivors may react with fright, tears, anger or withdrawal. The more that we can be soothing, calm and gentle, the more effective we can be. In addition, we should always be extra careful to ask permission before we touch these clients and handle them very gently when we do touch them. The attached list suggests some potential triggers, the source of those triggers and some possible ways we can intervene.

Triggers, Reasons and Interventions

Trigger: Taking a shower

Reason: In concentration camps, thousands of people were told they were going to take a shower. They were stripped and entered rooms that looked like large shower rooms. After the doors were closed, poison gas, not water, came out of the spigots. All who entered the shower rooms died there.

Intervention: As the fear of the showers does not mean a fear of water or cleanliness, some survivors use a hand held shower head that they can manipulate themselves. Another good option may be a sponge bath. Finally, caregivers may wish to wet themselves with the water first to reassure, or perhaps even to “prove” to the survivor that what is coming out of the spigot is really water.

Trigger: People who speak harshly, loudly, handle individuals roughly or in a manner which uses force.

Reason: Guards and police in ghettos and concentration camps treated the Jews very roughly. They pushed, pulled, yelled and forced the Jews to do many things and rarely spoke kindly.

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2245 Post Street • San Francisco • California 94115

Intervention: Staff should place extra emphasis on speaking softly and with kindness. Caregivers should ask permission before touching clients, especially when helping them to dress/undress and to bathe, and in general always handle them with care.

Trigger: Hiding or hoarding food, eating too fast

Reason: Whether in the ghettos, in hiding or in concentration camps, food was scarce. When food was available, people sometimes rationed themselves so there would be something left over in case they didn't get food again for a while. Some people stole food so they could bring it to their family members too weak to stand in rationing lines, or unable to come out of hiding for fear of capture and deportation. Those who were extremely hungry may have eaten the food they did receive very fast. Despite reassurances from staff that meals will be provided again tomorrow, survivors hid or hoard food to assure themselves. In this way, they attempt to provide for their own needs, rather than place their trust in others to provide for them.

Intervention: Although facilities have an important obligation to assure health and maintain sanitary conditions, it should be possible to allow survivors to take food that won't spoil back to their rooms, for example, canned food or canned drinks. Alternatively, there could be small refrigerator in which survivors could place some items and be allowed to retrieve these items as they wish.

Trigger: Darkness

Reason: Frightening things happened in the dark. Just as a child is frightened in the dark because s/he doesn't know what to expect, an inmate of a concentration camp or someone in hiding was also terrorized by the dark. For many, that fear did not end with the end of the war.

Intervention: Leaving lights on in the survivors' rooms at night can help to ease fears of the darkness. For example, a small nightlight will be sufficient, while for others, the room may need to be as light as during the daytime.

Trigger: Family members leaving after visits, separation of any kind

Reason: From 1993-1945, Jews were forcibly separated from friends, parents, children, siblings, spouses and other relatives, most of whom they never saw again. They did, and still do, feel a terrible sense of, and fear of, abandonment.

Trigger: White lab coats or uniforms

Reason: So-called "doctors" who performed medical experiments wore white lab coats as did their assistants. The guards who mistreated Jew horribly wore uniforms. Today, a police officer, postal worker or even a maintenance person in uniform could trigger a bad memory.

Trigger: Being hospitalized, medical procedures or physical therapy

Reason: If a person became noticeably ill in the concentration camps, one of three things may have happened to them. Either they were immediately killed because they were no longer able to work and therefore of no use, they were admitted to the concentration camp "hospital" where they were left to die or they were in danger of being subjected to horrible medical experiments.

Trigger: Restraints, locked doors, gates

Reason: Holocaust survivors were forced to do many things and may have been restrained for any number of reasons. Anytime you restrain a person or restrict their freedom, they may have

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the memory of being locked in the ghetto, or surrounded by the barbed wire that enclosed the camp.

Trigger: The sound of people crying or screaming

Reason: People in concentration camps and ghettos lived through unspeakable horrors. Many cried or screamed from either emotional or physical pain. Hearing someone else cry or scream may trigger the memory of being in a ghetto or concentration camp.

Trigger: Smell of feces or urine, antiseptic smells

Reason: on the long ride to concentration camps, many thousands of people were crowded into boxcars. There was often no room to sit and people had to stand for hours. There was no food, bathrooms or air. Many died during the trip and others were unable to hold their bowel movements or urine. The smell of waste may easily trigger the memory of those train rides or of conditions in the camps or ghettos. Many “hospitals” or barracks of concentration camps used harsh chemicals or antiseptics whose scent may conjure up frightening memories.

Trigger: Standing in line, crowded conditions, “go to the right, go to the left”

Reason: During the Holocaust, Jews had to stand in line for many things including food, water or use of the toilet barracks. Conditions were very often overcrowded in concentration camps and in ghettos where several families were often made to share quarters in apartments or homes meant for one family. In concentration camps, inmates were often awakened in the middle of the night and made to stand at attention in lines for hours for no reason, no matter what the weather conditions. Jews were often subject to “selections”. “Go to the right” or “go to the left” might have meant who was to go to the gas chambers and die or who would go to work detail.

Trigger: Flashlights, bright lights, sirens, bells, whistles

Reason: Flashlights and searchlights were used to find people who may have been in hiding or were shone in people’s eyes to wake them in the middle of the night. Sirens, whistles and bells are often used to frighten people or wake them. They were often associated with the fear of being “rounded-up” and deported.

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NAME: _____

DATE: _____

Orientation Training Post-Test. Return this form to instructor.

The following are True/False statements. Please put a T or F next to each statement.

1. ____ Basic Human Needs are the cleaning and personal care products the clients should have in their homes.
2. ____ As people age, they gradually lose their ability to learn.
3. ____ Progressive confusion and lack of judgment are normal signs of aging.
4. ____ The temperature on the heating pad should be set not higher than “medium” when left on overnight.
5. ____ Feedback is an essential component of effective communication.
6. ____ People who have a stroke always have a problem speaking.
7. ____ Parkinson’s Disease is associated with tremors and problems with posture, balance, and walking.
8. ____ We should bend at the waste to pick up and/or move an object.
9. ____ You should try to change the behavior of someone with Alzheimer’s disease by being rigid, firm, and persistent.
10. ____ Loose carpets, inadequate lighting, obstructed pathways, and faulty electricity are examples of fire and safety hazards in the home.
11. ____ Universal Precautions/Universal Standards means treating everyone’s body fluids as though they are infectious.
12. ____ Symptoms of active TB (Tuberculosis) include cough, bloody sputum, weight loss, and fever.
13. ____ Fatigue, distraction, lack of concentration, and stress are major contributions to accidents and errors.
14. ____ An unusual incident, such as a client fall or an employee injury, must be reported immediately to the Home Care Agency office.
15. ____ It is the responsibility of the Home Care Agency employee to be familiar with and have a plan for emergency preparedness in each client’s home.
16. ____ Hospice is a word that applies to the care of a terminally ill person.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

EMPLOYER SERVICES COMMITTEE (ESC)

DOCUMENTS DEPT.

MAY 25 2004

SAN FRANCISCO
PUBLIC LIBRARY

Date: Wednesday, May 26, 2004
Time: 10:00 a.m. – Noon
Location: Van Ness Plaza
Classroom 4 and 5
1650 Mission Street, Second Floor
San Francisco, CA 94103

AGENDA APPEARS ON THE REVERSE SIDE

Revised Agenda: Change of Location for the Meeting

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE (Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at www.ci.sf.ca.us/infoctr/sunshine/index.htm

OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Issued: May 21, 2004

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www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

Proposed Agenda
Employer Services Committee
Wednesday, May 26, 2004

Agenda Item	Presenter	Time
1. Adoption of the Agenda (<i>Action Item</i>)	Nathan Nayman	2 min
2. Adoption of Minutes from the meeting held on April 21, 2004 (<i>Action Item</i>)*	Nathan Nayman	2 min
3. Public Testimony of Agenda Items (<i>Discussion Item</i>)	Nathan Nayman	5 min
4. Customized Training Proposal Review (<i>Action Item</i>) Jewish Family and Children Services to Operate a Training Course for Home Health Aide I and Home Health Aide II	Robert Schwab	20 min
5. Customized Training Evaluation Report (<i>Discussion Item</i>) Hotel Labor Management and Education Funds Project (first project)	Robert Schwab	15 min
6. Customized Training Marketing Report (<i>Discussion Item</i>)	Robert Schwab	10 min
7. Public Testimony on Non-Agenda Items (<i>Discussion Item</i>)	Nathan Nayman	5 min
8. New Business (<i>Discussion Item</i>)	Nathan Nayman	10 min
9. Adjournment (<i>Action Item</i>)	Nathan Nayman	5 min

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**DRAFT MINUTES OF THE
MAY 26, 2004 MEETING OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

The meeting was held in the Auditorium of Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

Steve Arcelona, Theresa Feeley, Nathan Nayman, and John Poremba

DOCUMENTS DEPT.

JUN 21 2004

ABSENT:

William Allen, Kathye Citron, Ave Seltsam and Stan Warren

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WISF STAFF:

Alice Chiu, Lorraine Giordano, Sean Hallisey, Lucia Hughes, Catherine Markman and Robert Schwab

PUBLIC (AS EVIDENCED BY SIGN-IN SHEET):

John Liu, Amy Rassen and Jim Torrens

The meeting was convened at 10:10 A.M. The Employer Services Committee did not establish a quorum.

Chair Nayman asked that public testimony on agenda items be taken at the time of the presentation of the item.

Items 4- Customized Training Proposal

Robert Schwab gave a brief overview of the recommended proposal for Jewish Family and Children Services to operate an in-house customized training program. The amount requested is \$18,000 to train 70 participants in advanced Home Health Aide skills. Of the 70 participants, 50 are new hires and will be trained as Home Health Aides I, earning \$9.25 per hour prior to training. The other 20 individuals are existing Home Health Aides I, training to be Home Health Aides II.

Steve Arcelona encouraged the employer to recruit San Francisco residents in their program.

John Poremba expressed interest in data reflecting which participants have advanced in the career ladder.

Chair Nayman noted that the employer served survivors of the Holocaust; he asked what percentage of the clients are in that category. Amy Rassen replied that about 5% (average of 70 to 80 people) of their clients are survivors of the Holocaust.

Ms. Rassen thanked the Committee for establishing this program for employers and thanked staff for their assistance in the program application and understanding the intent of the program.

The Committee referred this proposal to the Executive Committee for review and approval.

Item 5 – Customized Training Evaluation Report

Robert Schwab shared with the Committee a draft of the evaluation report of all of the customized training programs and asked for feedback.

Chair Nayman asked that there be a column reflecting the employer's contribution.

Steve Arcelona expressed interest in seeing where there were upgrades or new hires and how many are San Francisco residents.

John Poremba would like to see a comparison of cost (public versus private training).

Mr. Schwab thanked the Committee for their comments and stated that this report would be shared no less than quarterly.

Item 6 – Customized Training Marketing Report

Robert Schwab presented a brief report of the customized training marketing efforts. Staff has developed a brochure and orientation packets for employers and are distributed in the One Stops. Staff had presence at several association events such as the Small Business Network. Staff has appointments to meet with the Mayor's Office of Economic Development and District of Merchants. There is also a phone for employers to call, (415) 401-4900.

Chair Nayman suggested speaking with the Golden Gate Restaurant Association and having a link on association's website. Lucia Hughes added that there is a link on www.sfbizinfo.org.

John Poremba noted that he will be making opening remarks at the Employer Advisory Council meeting and asked for information to speak on.

Public Testimony on Non Agenda Items

There was none.

Future Agenda Items

There was none.

The Committees adjourned at 11:05 A.M.

All written materials distributed at the meeting are posted on the Private Industry Council's website, www.picsf.org, and incorporated by reference herein.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**NOTICE OF A PUBLIC MEETING
OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

Date: Wednesday, June 23, 2004
Time: 9:30 a.m. to 11:30 a.m.
Location: Auditorium
Community College District Office
33 Gough Street
San Francisco, CA 94103

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

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(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

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Sunshine Ordinance Task Force
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If you require special accommodation due to a disability, contact Roberta Fazande at least 72 hours in advance at 415-923-4265, TDD 800-735-2929 (CRS) or rfazande@picsf.org

Lobbyist Registration and Reporting Requirements

Individuals and entities that influence or attempt to influence local legislative or administrative action may be required by the San Francisco Lobbyist Ordinance (SF Campaign & Governmental Conduct Code § 2.100) to register and report lobbying activity. For more information about the Lobbyist Ordinance, please contact the San Francisco Ethics Commission at 30 Van Ness Avenue, Suite 3900, San Francisco, CA 94102; telephone (415) 581-2300; fax (415) 581-2317; web site: sfgov.org/ethics.

Issued: Wednesday June 16, 2004

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DRAFT AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
WEDNESDAY, JUNE 23, 2004

1. Adoption of the Agenda (*Action Item*)
2. Adoption of Minutes from the January 5th, February 2nd, March 26th, April 21st, and May 26th meetings (*Action Item*)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Customized Training Proposal Review (*Discussion and Possible Action Item*)*
Jewish Home for the Aged to Operate a Certified Nursing Assistant Training Course
5. Customized Training Evaluation Update (Discussion Item)
6. Customized Training Marketing Report (Discussion Item)
7. Public Testimony on Non-Agenda Items (Discussion Item)
8. Future Agenda Items (Discussion Item)
9. Adjournment (*Action Item*)

* Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE

DATE: JUNE 17, 2004

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: RECOMMENDATION TO REVIEW JEWISH HOME FOR THE AGED
CUSTOMIZED TRAINING PROPOSAL TO OPERATE A CERTIFIED NURSING
ASSISTANT TRAINING PROGRAM (Agenda Item 4)

ACTION REQUESTED

The Committee is asked to review the Customized Training proposal of Jewish Home for the Aged (JHA) to operate a Certified Nursing Assistant (CNA) training program. The total cost of the training is proposed at \$240,000. JHA is requesting funding in the amount of \$120,000 to train 30 new hires.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost and hire or retain those successfully complete the training.

On June 15, 2004 JHA and Jewish Vocational Services (JVS) jointly submitted a proposal to PIC for funding of a Customized Training project.

Based on staff's review of the proposal, the Program intends to train 30 individuals in two cycles with approximately 15 participants per cycle. The training consists of three modules:

1. JVS, the employer-selected training provider, will conduct the first module of the training. This 12- hour training is designed to provide participants job readiness skills to maximize their success as CNAs with JHA. The job readiness component consists of assessment, job readiness training and ongoing case management. JVS will also conduct outreach and recruitment of trainees.
2. The second module makes up the classroom portion of the Customized CNA training. This 220-hour training will be conducted by JHA.
3. The third module makes up the clinical portion of the training. This 100-hour clinical training will be provided by JHA. During this training period, participants will be learning on-the-job. While not traditional under the current Customized Training model, On-the-Job Training (OJT) is a form of Customized Training. Staff recommend that this portion

of the training be funded by Customized Training funds through the OJT mechanism, where WIA funds is used to pay the employer as a result of loss productivity in training new employees. The payment from WIA funds is equivalent to half of wages paid to the participants.

As proposed, the total training cost of all three components is \$241,920, of which \$120,000 is requested in WIA Customized Training funds.

Participants will be hired as employees of JHA at the start of the training, and they will be paid \$12.40 per hour in wages during the training period. JHA proposed to retain at least 20 successful completers of the program.

RECOMMENDATION

Because of the complexity of the proposed program, and the potential to structure part of this Customized Training program as OJT with a payment to employer equivalent to 50% of the wages paid, staff does not yet have all the necessary information to detail the funding arrangement. We continue to work with the employer and training provider to resolve these issues.

Nevertheless, given the strength of the program and its potential to address a critical skills shortage, staff recommend approval on the following conditions:

1. Employer hires all successful completers of the program.
2. Employer pays half of all identified allowed training costs and outline costs in a clear budget.
3. In the case of OJT, payments based on wages will not overlap payment for training cost and will be limited to 50% of wages paid for approved training time.

If you have any questions prior to the meeting, please contact Robert Schwab at 431-8700.

Attachment



PRIVATE INDUSTRY COUNCIL
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CUSTOMIZED TRAINING PROPOSAL

I. EMPLOYER INFORMATION (To be completed by Employer):

Company: Jewish Home Telephone #: 415/469-2210
Address: 302 Silver Avenue Training Site Address (If Different):
San Francisco, CA 94112
Name & Title of Contact Person: Sandra Simon, Administrator
Individual(s) Authorized to Sign Invoices: Sandra Simon, Administrator
Number of full-time employees: 570 Incorporated: YES [X] NO []

II. TRAINING PROVIDER INFORMATION (To be completed by Training Provider):

Organization: Jewish Vocational Service/Jewish Home Telephone #: 415/391-3600
Address: 225 Bush Street, Suite 400, San Francisco, CA 94104 and as above
Name & Title of Contact Person: Jim Torrens, Director of Training
Federal Employer Identification Number: _____
State Identification Number: _____
Workers' Compensation Policy Carrier: State Compensation Insurance Fund
Workers' Compensation Policy No.: 1722387 Expiration Date: January 1, 2005
PIC's Eligible Training Provider Lists (ETPL) Number (if applicable) N/A

III. INSTRUCTOR'S QUALIFICATION (To be completed by Training Provider):

Name & Title of Instructor: Lead Instructor: Elaine Sugitan, RN
Instructor: vacant – RN required
Job Readiness Instructor: Yolanda Silva

Years of Relevant Experience: Please see instructor resumes, attached.

Does he/she have a teaching certificate or other credential (if yes, please attach a copy)? Please see attached resumes for credentials.

References: Please attach at least two clients for which comparable training was performed by you.

Sonia Nikazy
(415) 648-6725

Joshua Espino
(415) 468-6703

Joanne Balderama
(415) 252-7323

IV. TRAINING PROGRAM DATA (To be completed by Employer and Training Provider): (use an attached sheet is necessary)

A	B	C	D
Trainee Name (For Current Employee)	Participant(s) Job Title (For Current Employee)	Pre-Training Wage	Post Training Title
N/A	N/A	N/A	Certified Nursing Assistant

(a) Recruitment:

Do you need help in the recruitment of trainees? NO

If so, how many trainees do you need to recruit? _____

(b) Qualification:

Do you have an employee minimum qualification skill set? This would be a set of expected employee skills such as literacy and fluency in English, appropriate grooming skills, and the like.

☒ **Yes (See Certified Nursing Assistant job description, attached.)**

☐ No

Would you like PIC to provide one for you?

☐ Yes

☒ No

V. TRAINING COST (To be completed by Training Provider):

Complete and attach forms CTP 100 and CTP 222, as this will constitute your PIC invoice upon acceptance of proposal.

	Cost
A. INSTRUCTIONAL COST	\$231,390
B. TRAINING MATERIALS	\$1,350
C. TRAINING FEES	\$7,260
TOTAL	\$240,000

VI. ORGANIZED LABOR CONCURRENCE:

Concurrence Given By: N/A

NAME OF UNION REPRESENTATIVE

Title: _____

Date: _____

VII. TRAINING OUTLINE (to be completed by Employer and Training Provider)

OES JOB TITLE: Nursing Aides, Orderlies, and Attendants OES #: 31-1012

EMPLOYER'S TITLE FOR THIS JOB: Certified Nursing Assistant

To Be Completed By the Training Provider

Include a detailed outline of training to be provided, tasks to be learned, and approximate hours of training required for each task.

Job readiness pre-course

JVS will offer a 12-hour Job Readiness pre-course that will focus on organizational skills and other "soft" skills students may need assistance with prior to working in a structured, health care environment. JVS will facilitate this training and will utilize curricular materials developed with input from the Jewish Home to ensure that this training offers students the best chance to succeed as CNAs.

CNA training

The Jewish Home will provide curriculum, instructors, and classroom space for the CNA training. We propose two cycles of training, which would run September – November 2004 and March – May 2005.

Under the existing and proven training model, the Jewish Home hires trainees prior to the start of training and pays them a wage based on entry-level CNA wages. We propose an On-the-Job-Training component whereby the Jewish Home will then be reimbursed for half of those wages.

Training consists of an eight-week, full-time state-approved curriculum covering the following topics:

- a) Rehabilitation Care, including assisting patient to walk (4 hours)
- b) Emergency Procedures, including Heimlich, applying restraints, applying supports (3 hours)
- c) Patient Care Skills, including personal hygiene, bowel and bladder retraining (54 hours)
- d) Vital Signs, including pulse, respiration, temperature, blood pressure (6 hours)
- e) Measuring, including output and intake (1 hour)
- f) Nutrition, including use of feeding assistance devices (6 hours)
- g) Observation and charting (6 hours)
- h) Resident Care Procedure, including collection and identifying specimens, administering enemas and suppositories, care of residents with tubing (20 hours)
- i) Medical and Surgical Asepsis, including proper hand washing and universal precautions (8 hours)
- j) Body Mechanics, including moving helpless residents, positioning the resident, transfer from wheelchair to bed and back (5 hours)
- k) Residents Rights, including privacy curtains, keeping records confidential (2 hours)
- l) Theory, Introduction to lay term care, working environments, special needs of elderly, basic nursing care, anatomy and physiology (110 hours)
- m) Skills Lab, Vital signs, ambulation, transfer technique, bed making (91 hours)

JVS will provide ongoing support for students during their training. This support may include tutoring, assistance with childcare and transportation, and referral to other supportive services.

To Be Completed By the Employer

Provide a thorough description of the job skills for which training is being requested.

Please refer to training program outline, above, and job description, attached.

To Be Completed By the Employer

- (1) How would you define successful completion of training program? Please be specific, as this definition will be used to evaluate success of training program and the participants' suitability for post training placement/ advancement.

Over the course of the program, students will be administered daily tests addressing each day's subject matter (see Training Outline, above). To successfully complete, students may not fail more than seven of these tests over the entire 8-week training period.

In addition, strict attendance, particularly during clinicals, is required. To successfully complete, students may not miss more than eight of 100 hours of clinical practice time over the course of the training period.

The ultimate measure of whether participants have successfully completed the program is a final exam, based on the State of California's Certified Nursing Assistant exam and including both theoretical and practical components covering the topics described in the Training Outline, above. To successfully complete the program, each participant must receive a passing grade on this exam.

For more detail, please see Criteria For Successful Completion of the Pre-Certification Program, attached.

- (2) Do you have an assessment tool to assess trainee's skills attainment? ☒ Yes
☐ No
If yes, please attach.

Over the course of the training period, staff are continuously assessing participants' skills attainment, as described immediately above.

Ultimately, however, all trainees must pass the State of California Department of Health Services written and practical examination to obtain a certificate as a Certified Nursing Assistant before hire. This is the primary, externally valid measure of skills attainment.

- (3) Please detail the number and type of positions that you plan to open, or the number of employees and type of positions that you plan to advance upon successful completion of the training.

The Jewish Home has ongoing need for well-trained Certified Nursing Assistants. In the coming year, the Jewish Home expects to hire at least 20 new CNAs (and likely more), all of them successful completers of the CNA training program. In the event that insufficient openings are available at the time of training completion, however, successful training completers who are not hired by the Jewish Home should have little difficulty finding CNA jobs with other local employers in need.

EMPLOYER ASSURANCES

As a condition of the Customized Training Agreement, the Employer must:

1. Identify customized training program participants.
2. Make good faith effort to hire or advance trainee(s) at the successful completion of the training within 30 calendar days. Advancement must take the form of wage increase, work hour increase, benefit increase or a combination of all three.
3. For the training of existing employees, provide the participants with an increase in benefits or earnings, *and* a greater potential for career advancement when compared with those received prior to their training.
4. Insure all trainees are not currently earning a self-sufficient wage that has been determined by the Local Board as \$15.08 per hour or \$2,652.75 per month. Providing supporting documentation such as salary records, W-2 forms or the like will satisfy this.
5. Fully complete Training Outline.
6. Pay at least 50% of the training cost plus any agreed upon administrative costs.
7. Make payment of the Employer Contribution to the PIC in two installments; 50% upon signing of the agreement, and the balance upon completion of the training program *regardless* of trainee(s)' training performance outcome.
8. Provide periodic data to PIC for monitoring review and continuous improvement purposes.

PIC ASSURANCES

As a condition of the Customized Training Agreement, the PIC will:

1. Administer the customized training funds.
2. Monitor the training provider's performance.
3. Facilitate communication between the employer and the training provider.
4. Report monthly, quarterly and annual program outcomes as needed for the Employer, the Training Provider and the WIB Employer Services Committee.
5. Provide trainee's eligibility certification.
6. Provide authorization of enrollment subject to the Employer's selection.
7. Retain license or title to intellectual, personal, and real property produced or purchased under the agreement.
8. Approve Employer's successful completion criteria.

TRAINING PROVIDER ASSURANCES

As a condition of the Customized Training Agreement, the Training Provider must:

1. Comply with all provisions of state and federal equal opportunity and nondiscrimination laws including but not limited to: Title VI and VII of the Civil Rights Act of 1964, as amended; the Age Discrimination Act of 1975, as amended; Sections 503 and 504 of the Rehabilitation Act of 1973; and the Americans with Disabilities Act of 1990.
2. Not exclude from participation in, deny the benefits of, subject to discrimination by, or deny employment in the administration or any program or activity any individual because of race, color, religion, sex, national origin, age, disability, political affiliation or belief.
3. Comply with the child labor provisions of the Fair Labor Standards Act (FLSA.)
4. Comply with provisions that limit the use of funds for political activities.
5. Disclose lobbying activities pursuant to 31 USC 1352.
6. Establish safeguards to prohibit employees from using their positions for a purpose that is or appears to be for private gain for themselves or others, particularly those with whom they have family, business, or other ties.
7. Maintain appropriate standards of health and safety in work and training.
8. Comply with the required provision of workers' compensation protection to participants in customized training, at the same level and to the same extent as other employees of the employers who are covered by a state or industry workers' compensation statutes; and provision of workers' compensation insurance or medical and accident insurance for injury or disease resulting from their participation.
9. Insure the program has adequate administrative controls, personnel standards, evaluation procedures, availability of in-service training and other policies as may be necessary to promote the effective use of the subcontract funds.
10. Insure all of the training provider's employees and all of its subcontractors (if applicable) will act professionally and will comply with all requirements of the federal Privacy Act, all pertinent requirements of California State law (specifically, section 1798.55 of its Civil Code, section 10850 of its Health and Welfare Institutions Code, section 501 of its Penal Code, and section 2111 of its Unemployment Insurance Code), all pertinent requirements of the San Francisco Administrative Code, agreements which the PIC has entered into with agencies of the Federal, State of California, and City and County of San Francisco governments and the PIC's policies and procedures in treating all particularized information on individual employers and participants confidentially, sharing such information only with other authorized persons or organizations, and formally requesting written authorization from the PIC before releasing such information in specific circumstances where the applicability of any of these requirements might be unclear.
11. Comply with the provisions of the Fair Employment and Housing Act (Govt. Code, Section 12900 et seq.) the regulations promulgated thereunder (California Administrative Code, Title 2, Section 285.0 et seq.) the provisions of Article 9.5, Chapter 1, Part 1, Division 11135 – 11139.5) and the regulations or standards implement such article.
12. Understand that it may be subject to the examination and audit of the Auditor General for a period of three years after final payment under the subcontract (Govt. Code Section 10532.)
13. Certify that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal debarment or agency [Executive Order 12549, Debarment, and Suspension, 29 CFR Part 98, Section 98.510, Participants' Responsibilities.]
14. Provide occupational skills training as subcontracted.
15. Assist the employer and employee with job retention services when necessary.

CANCELLATION NOTICE

**Employer Services Committee
meeting scheduled for
Wednesday, July 28, 2004
is cancelled.**

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JUL 23 2004

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**The next scheduled meeting is
August 25, 2004
from 10 AM to 12 noon.**

**Thank you and please visit
www.picsf.org for meeting
updates and other information.**

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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AUG 23 2004

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Date: Wednesday, August 25, 2004
Time: 10:00 a.m. to 12:00 noon
Location: Auditorium
Community College District Office
33 Gough Street
San Francisco, CA 94103

08-23-04A10:23 RCVD

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE

(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724
Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

The Sunshine Ordinance is also available online at: www.sfgov.org/site/sunshine_index.asp?id=4673

Other accommodations

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

If you require special accommodation due to a disability, contact Roberta Fazande at least 72 hours in advance at 415-923-4265, TDD 800-735-2929 (CRS) or rfazande@picsf.org

Lobbyist Registration and Reporting Requirements

Individuals and entities that influence or attempt to influence local legislative or administrative action may be required by the San Francisco Lobbyist Ordinance (SF Campaign & Governmental Conduct Code § 2.100) to register and report lobbying activity. For more information about the Lobbyist Ordinance, please contact the San Francisco Ethics Commission at 30 Van Ness Avenue, Suite 3900, San Francisco, CA 94102; telephone (415) 581-2300; fax (415) 581-2317; web site: sfgov.org/ethics.

Issued: Thursday, August 19, 2004

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

DRAFT AGENDA
EMPLOYER SERVICES COMMITTEE OF THE WISF BOARD
WEDNESDAY, AUGUST 25, 2004

1. Adoption of the Agenda (*Action Item*)
2. Adoption of Minutes from the January 5th, February 2nd, and March 26th (*Action Item*)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Proposed refinement of the Customized Training Policy (*Discussion and Possible Action Item*)*
5. Public Testimony on Non-Agenda Items (Discussion Item)
6. Future Agenda Items (Discussion Item)
7. Adjournment (*Action Item*)

* Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE **DATE:** AUGUST 25, 2004

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: RECOMMENDATION TO APPROVE THE PROPOSED REFINEMENT OF THE CUSTOMIZED TRAINING POLICY

ACTION REQUESTED

The Committee is asked to approve the proposed refinement of the Customized Training Policy.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The policy however, did not provide clarification of what are considered allowable training costs and services. Some Customized Training proposals submitted to the Employer Services Committee request funding for services that are not allowable under the Workforce Investment Act for customized training.

The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers by hiring a third party selected by the employer to train underemployed or employed individuals. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficiency wage as determined by the Board. The employer is required to cover at least 50% of the training cost and hire or retain those who successfully complete the training.

According to the Workforce Investment Act, "Funds provided under this title shall only be used for activities that are in addition to those that would otherwise be available in the local area in the absence of such funds." Moreover, services that fit the description of Core and Intensive services under the WIA Act, do not constitute reimbursable training costs. (A copy of relevant WIA statutory and regulatory language related to core, intensive and training services is attached.)

RECOMMENDATIONS

Staff makes the following recommendations:

(1) Amend item #2 to the WISF Board Customized Training Policy to include the following statements: *"Customized Training funds may not be used for costs that would be incurred by the employer in the normal course of business were the customized training program not to occur. In other words, WIA Customized Training funds may only be used to pay new costs generated by undertaking the training project."*

"Services that fit the description of core and intensive services under the Workforce Investment Act do not constitute reimbursable training costs. Wages during training are also not considered reimbursable costs. Employer shall provide documented proof of his/her share of training cost."

(2) Specify in the Customized Training Policy that Customized Training funds should only be used to pay for the training cost and new costs generated by undertaking the customized training activities. For example, if an employer owns the building in which the training will take place, Customized Training funds should not be used to pay for use of the space, as it is a cost that would be incurred by the employer in the normal course of doing business.

Staff will be available at the Employer Services meeting on August 25, 2004. If you have any questions prior to the meeting, please call Robert Schwab at 415-431-8700.

Excerpts from the WIA Statutory and Regulatory Language related to Core, Intensive and Training Services

Core Services [Section 134(d)(2)]

Funds described in paragraph (1)(A) shall be used to provide core services, which shall be available to individuals who are adults or dislocated workers through the one-stop delivery system and shall, at a minimum, include

- (A) determination of whether the individuals are eligible to receive assistance under this subtitle;
- (B) outreach, intake (which may include worker profiling), and orientation to the information and other services available through the one-stop delivery system;
- (C) initial assessment of skill levels, aptitudes, abilities, and supportive service needs;
- (D) job search and placement assistance, and where appropriate, career counseling;
- (E) provision of employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including-
 - (i) job vacancy listings in such labor market areas;
 - (ii) information on job skills necessary to obtain the jobs described in clause (i) ; and
 - (iii) information relating to local occupations in demand and the earnings and skill requirements for such occupations; and
- (F) provision of performance information and program cost information on eligible providers of training services as described in section 122 provided by program, and eligible providers of youth activities described in title II, providers of postsecondary vocational education activities and vocational education activities available to school dropouts under the Carl D. Perkins Vocational and applied Technology Education Act (20 U.S.C. 2301 et seq), and providers of vocational rehabilitation program activities described in title I of the Rehabilitation Act of 1973 (29 U.S.C. 720.);
- (G) provision of information regarding how the local area is performing on the local performance measures and any additional performance information with respect to the one-stop delivery system in the local area;
- (H) provision of accurate information relating to the availability of supportive services, including child care and transportation , available in the local area, and referral to such services, as appropriate;
- (I) provision of information regarding filing claims for unemployment compensation;
- (J) assistance in establishing eligibility for—
 - (i) welfare-to-work activities authorized under section 403(a)(5) of the Social Security Act (as added by section 5001 of the Balanced Budget Act of 1997) available in the local area; and
 - (ii) programs of financial aid assistance for training education programs that are not funded under this Act and are available in the local area; and
- (k) follow-up service, including counseling regarding the workplace, for participants in workforce investment activities authorized under this subtitle who are placed in unsubsidized employment, as appropriate.

Intensive Services [Section 134(d)(3)(C)]

Type of services- such intensive services may include the following:

- (1) Comprehensive and specialized assessments of the skill level and service needs of adults and dislocated workers, which may include-
 - a. Diagnostic testing and use of other assessment tools; and
 - b. In-depth interviewing and evaluation to identify employment barriers and appropriate employment goals

- (2) development of an individual employment plan, to identify the employment goals, appropriate achievement objectives and appropriate combination of services for the participant to achieve the employment goal.
- (3) Group counseling
- (4) Individual counseling and career planning
- (5) Case management for participants seeking training services under paragraph (4)
- (6) Short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct, to prepare individuals for unsubsidized employment or training.

Training Services [Section 134(d)(4)(D)]

Training services may include-

- (1) Occupational skills training, including training for nontraditional employment;
- (2) On-the-job training;
- (3) Programs that combine workplace training with related instruction, which may include cooperative education programs;
- (4) Training programs operated by the private sector;
- (5) Skills upgrading and retraining;
- (6) Entrepreneurial training;
- (7) Job readiness training;
- (8) Adult education and literacy activities provided in combination with services described in any of clauses (1) through (7); and
- (9) customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

Customized Training [Section 101(8)]

- The term "customized training" means training –
 - (A) that is designed to meet the special requirements of an employer (including a group of employers);
 - (B) that is conducted with a commitment by the employer to employ an individual on successful completion of the training; and
 - (C) for which the employer pays for not less than 50% of the cost of the training.

On-the-Job Training [Section 101(31)]

- The term "on-the-job training" means training by an employer that is provided to a paid participant while engaged in productive work in a job that –
 - (A) provides knowledge or skills essential to the full and adequate performance of the job;
 - (B) provides reimbursement to the employer of up to 50% of the wage rate of the participant, for the extraordinary costs of providing the training and additional supervision related to the training; and
 - (C) is limited in duration as appropriate to the occupation for which the participant is being trained, taking into account the content of the training, the prior work experience of the participant, and the service strategy of the participant, as appropriate.

Requirements and Restrictions

[Sec. 181 (d)(2)]

Prohibition on use of funds for customized or skill training and related activities after relocation. – no funds provided under this title for an employment and training activity shall be used for customized or skill training, on-the-job training, or company-specific assessments of job applicants or employees, for any business or part of a business that has relocated, until the date that is 120 days after the date on which such business commences operations at the new location, if the relocation of such business or part of a business results in a loss of employment for any employee of such business at the original location and such original location is within the United States.

20 CFR§§663.595

What are requirements apply to providers of OJT and customized training?

For OJT and customized training providers, One-Stop operators in a local area must collect such performance information as the Governor may require, determine whether the providers meet such performance criteria as the Governor may require, and disseminate a list of providers that have met such criteria, along with the relevant performance information about them, through the One-Stop delivery system. Providers determined to meet the criteria are considered to be identified as eligible providers of training services. These providers are not subject to the other requirements of WIA section 122 or this subpart.

20 CFR§§663.700

What are the requirements for the on-the-job training (OJT)?

- (a) On-the-Job training (OJT) is defined at WIA section 101(31). OJT is provided under a contract with an employer in the public, private non-profit, or private sector. Through the OJT contract, occupational training is provided for the WIA participant in exchange for the reimbursement of up to 50 percent of the wage rate to compensate for the employer's extraordinary costs. (WIA sec.101(31) (B).)
- (b) The local program must not contract with an employer who has previously exhibited a pattern of failing to provide OJT participants with continued long-term employment with wages, benefits, and working conditions that are equal to those provided to regular employees who have worked a similar length of time and are doing the same type of work. (WIA Sec. 195 (4).)
- (c) An OJT contract must be limited to the period of time required for a participant to become proficient in the occupation for which the training is being provided. In determining the appropriate length of the contract, consideration should be given to the skill requirements of the occupation, the academic and occupational skill level of the participant, prior work experience, and the participant's individual employment plan. (WIA sec. 101(31)(C).)

20 CFR§§663.715

Customized training is training:

- (a) That is designed to meet the special requirements of an employer (including a group of employers);
- (b) That is conducted with a commitment by the employer to employ, or in the case of incumbent workers, continue to employ, an individual on successful completion of the training; and
- (c) For which the employer pays for not less than 50% of the cost of the training. (WIA sec. 101(8))

20 CFR §§663.720

What are the requirements for customized training for employed workers?

Customized training of an eligible employed individual may be provided for an employer or a group of employers when:

- (a) The employee is not earning a self-sufficient wage as determined by Local Board Policy;
- (b) The requirements in Sc. 663.715 are met; and
- (c) The customized training relates to the purposes described in Sec. 663.705(c) or other appropriate purposes identified by the Local Board.

20 CFR §§663.705(c)

The OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy, or other appropriate purpose identified by the Local Board

20 CFR §§663.730

May funds provided to employers for OJT of customized training be used to assist, promote, or deter union organizing?

No, funds provided to employers for OJT or customized training must not be used to directly or indirectly assist, promote or deter union organizing.

CANCELLATION NOTICE

Employer Services Committee
meeting scheduled for
September 29, 2004
is cancelled.

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OCT 12 2004

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The next scheduled meeting is
October 27, 2004
from 10 AM to 12 noon.

Thank you and please visit
www.picsf.org for meeting
updates and other information.

CANCELLATION NOTICE

**Employer Services Committee
meeting scheduled for
November 24, 2004
is cancelled.**

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11-22-04 A11 04 KCV

**Employer Services Committee will
join the
Program Resources Committee on
December 7, 2004
from 10 AM to 12 noon.**

**Thank you and please visit
www.picsf.org for meeting updates
and other information.**

